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ABSTRACT

Given the results of experience and research, it is no longer possible to treat school textbooks as something incidental or accessory to the educational process. In the last few years, funding agencies have gradually but systematically initiated reflection on textbooks. It is now accepted that pupil access to school textbooks is one criterion for assessing the quality of education and that the provision of school textbooks is an effective strategy for improving results. These and other considerations demonstrate that the matter of school textbooks absolutely must be taken into consideration at the highest level of educational planning. Part 1 of this document has three sections. Section 1, "Paths and Directions," includes information on planning at the highest level, a macroeconomic approach, and separation of the publishing function from curriculum development. Section 2, "Thresholds and Limits," includes information on financing, quality and effectiveness, and authors and copyright. Section 3, "Choices and Priorities," includes a discussion on national planning departments, cooperation agencies, and the need for a data bank with easy access. Part 2 contains five selected papers presented at the seminar: "Macro-Planning of School Textbooks and Teaching Materials" (Aime Damiba); "Key Issues in the Management of Textbook Development" (Anthony Read); "Curricula and School Textbooks: Toward Indispensable Synergy" (Christian Depover); "Copyright and the National Production of Educational Materials" (Abderrahmane Amri); "What Is an Appropriate School Textbook Policy in Developing Countries? Some Economic and at Times Impertinent Thoughts" (Francois Orivel). Part 3 gives the recommendations adopted by the international conference on public education concerning the drafting, utilization, and choice of school textbooks 1938-59. (23 references) (RR)

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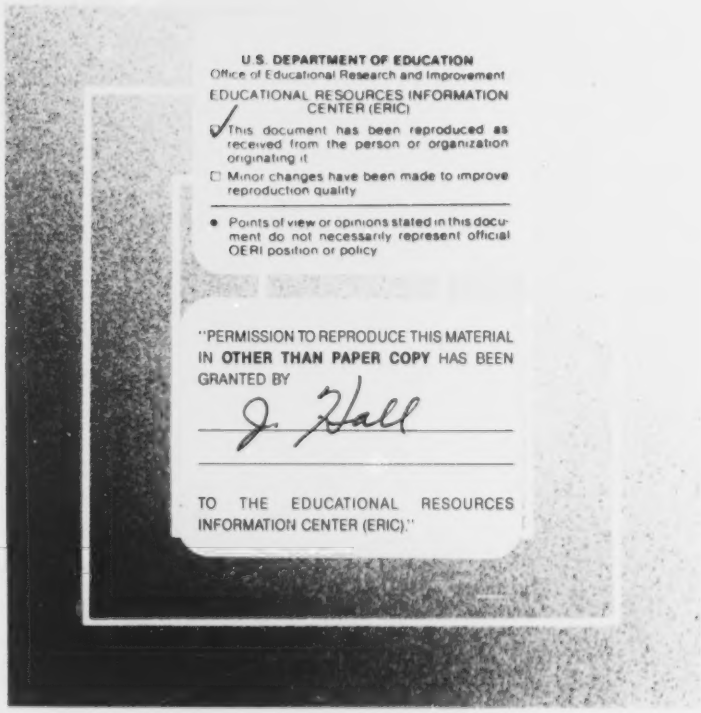
The development of school textbooks and teaching materials

Report of an IIEP Seminar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Etienne Brunswic
Habib Hajjar
Jean Valérien

Paris
27 - 30 November 1990

EA 023 848

International Institute for Educational Planning
(established within the framework of UNESCO)

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Seminar on the development of school textbooks and teaching materials

Report of an IIEP seminar
Paris, 27 - 30 November 1990

Etienne Brunswic
Habib Hajjar
Jean Valérien

International Institute for Educational Planning
(established by UNESCO)

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Preface

The seminar *on the development of school textbooks and teaching materials*, held in Paris from 27 to 30 November 1990, illustrates the willingness of the International Institute for Educational Planning to give more attention to *issues of administration and management*. It has become no longer necessary to limit the scope of planning just to the overall conception of the evolution of educational systems: it is necessary to bring into the planner's consideration those concrete problems of implementation that often play a very decisive role in the choice of the objectives.

In this respect, the planning of access to school textbooks is a highly appropriate area for consideration and action by planners. How can or should the planner take on this new responsibility? Who should do what? What are the roles of the state, the para-public sector and the private sector? Who should finance the effort? Who should pay for the textbook? Who should do the organizing? Who should be responsible for administration? How can one test the feasibility and the viability of a programme before advising its implementation to the political authority? How can one ensure the transition from a school textbook development project based on external aid to a programme financed only with national resources?

The Institute's experience in the field of school textbooks and teaching materials is relatively recent:

- an initial investigation through a 'state of the art survey' on the basis of the existing literature (1989);
- inclusion of a specialized workshop on textbooks in the Institute's 1989/90 annual training course;
- preparation and holding of the seminar on the development of school textbooks in November 1990.

This international seminar on the subject of school textbooks brought together *planners, representatives of funding agencies, educators, economists, experts and publishers*. This composition underscores the originality of the approach, and demonstrates the Institute's innovative willingness to become involved in field activities, by deliberately extending the dialogue to encompass all possible partners.

The work of the participants points to very many possible directions: By selecting those that are most closely related to its specific character, the IIEP is in a position *to define its current priorities*, just as it is in a position to call on recognized expertise to act in co-operation with Unesco's Secretariat, and with national agencies and institutions, through the modes of intervention specific to it, which are the dissemination of information, and training and raising the awareness of decision-makers and planners.

The IIEP extends its gratitude to all participants in the seminar for their contribution to its success.

Jacques Hallak,
Director, IIEP

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Part I

Report of the seminar

Introduction

The generalization of basic education is still far from being a reality, as stressed by the World Conference on Education for All, held at Jomtien, Thailand, in 1990 as part of the international literacy year.

> "More than 100 million children, including at least 60 million girls, have no access to primary education."
> "More than 100 million children and countless adults fail to complete basic education programmes; millions more satisfy the attendance requirements but do not acquire essential knowledge and skills."
> [World Declaration on Education for All. Preamble.]
> "Meeting basic learning needs constitutes a common and universal human responsibility. It requires international solidarity and equitable and fair economic relations in order to redress existing economic disparities."
> [World Declaration on Education for All, Article 10.]

1. The rapid deterioration of the economic situation observed in numerous developing countries (recession, financial constraints, etc.) is quite naturally resulting in budgetary savings and cuts where it is easiest to apply them, and hence in the resources allocated to school textbooks and teaching materials.

> "The production and distribution of school textbooks in developing countries are facing a number of problems, many of which are due to factors beyond the national context. The introduction of the Structural Adjustment Programme has, for example, had a considerable impact on the problems of textbook production and distribution. The weak purchasing power of poor families have, for example, reduced the demand for textbooks". [Contribution SIDA S110/10.][1]

Given the results of experience and research, it is now no longer possible to treat school textbooks as something incidental or accessory to the educational process. Quite the contrary, it has been proved that textbooks and teaching materials play *a fundamental role* in the acquisition of knowledge by pupils, and in the improvement of school results.

2. The area of school textbooks and teaching materials is so vast, including so many different types of equipment and material, that it is impossible to tackle the entire area if one hopes to carry out a fine and detailed analysis. In the field of written materials, school books already constitute a complex area, and this is why the seminar was mainly concerned with questions linked with the development of school textbooks.

1. See the appendix for the identification of contributions written for the seminar.

Box N° 1: Elementary typology of written works for schools

Textbooks for pupils (learning, progression)
Exercise notebooks
Teacher's course book
Methodological guide for the teacher
Collective works:
- (dictionaries, grammars, encyclopedias) geographical maps wall posters ...

Works for the school library:
- open to pupils, open to teachers, open to the community ...

Manuals and monographs
Annals (examination subjects)
Holiday homework notebooks ...

Source: E. Brunswic and J. Valérien. IIEP Course 1989/1990.

3. The importance given by educational authorities and researchers to textbooks is relatively recent: it is only in the last few years that funding agencies have gradually but systematically initiated reflection on the subject, treated hitherto as trivial and not very modern.

> "In the first place, over the last three decades, the focal point of interest for educators the world over shifted towards the impact that new electronic means of communication were supposedly going to have on educational systems. It was erroneously assumed that the more modern, complex and costly the medium, the better the educational result. Traditional methods, among them the printed text, had to take second place, and their use was associated with underdeveloped or backward educational models... More importance was given to science laboratories, or televisions in the classroom, than to elements which were less costly, though used extensively by teachers, such as textbooks....As a consequence, during the last few decades, the publishing industry, more than the educational sector, has been studying the problematics of textbooks...".
> Contribution J. Munoz Juan S110/12.)

4. It is now accepted that pupil access to a school textbook is one criterion for assessing the quality of education, and that the provision of school textbooks is an effective strategy for improving results.

5. As far as the school textbook situation is concerned, there are considerable differences both between industrialized and developing countries, and among developing countries themselves. The scope of these differences is such that it is difficult to compare the situations in different countries. Each country must find its own solutions as a function of its specific characteristics (see Appendix I, page 29).

6. Know-how pertaining to school textbooks is now fully identified and available through appropriate technology transfers in the areas of design, production, distribution and utilization. The main difficulty in developing optimal conditions usually consists in a lack of coherence in the interaction among the different educational, political, economic, administrative and technical partners, and also in the fact that the priority is often wrongly

given to the manufacturing processes, to the detriment of the conception and design tasks (all too frequently neglected).

Box N° 2: Prices and effectiveness cost ratios for educational inputs, Northeast Brazil, 1985

Inputs	$ (1985)	Effectiveness/$ (Grade 2 reading)
Software inputs		
Writing materials available		
in classroom	1.76	7.33
Chalk	0.03	
Notebooks	0.51	
Black pencils	0.34	
Erasers	0.15	
Crayons	0.73	
Textbooks available at schools and home	1.65	5.50
Alternative in-service teacher		
Education strategies		
Qualification courses	2.50	0.91
LOGOS II (Distance secondary education)	1.84	2.07

Source: Harbison and Hanushek (1988).

7. All these considerations clearly demonstrate that, in the face of an often critical situation, *the matter of school textbooks absolutely must be taken into consideration* at the highest level of educational planning.

This by no means suggests that the planner should master all the complex details of the processes of designing, publishing and distributing textbooks, just as planning the building of a school does not mean replacing the construction manager or the architect.

On the other hand, it is absolutely essential, in any reflection on the allocation of resources, to treat the book not as just one more operating expense, but *as a genuine investment*, just like training teachers or building schools.

Box N° 3: Gains in effectiveness in the North-East region of Brazil

An ongoing study in Brazil provides solid evidence of potential cost-savings from investments in inputs that improve student learning. According to the researchers, the results are 'stunning'.

With financial assistance from the World Bank, the Brazilian government undertook in 1980 a programme of massive educational investment in rural schools in the northeast, the poorest region in the country.

Evaluations carried on over the past six years show that investments in a variety of quality-enhancing inputs boosts student learning. Increased learning in turn reduces student repetition and dropout. The result is a significant cost-saving, as fewer resources are consumed by fewer repeaters and dropouts. In low-income Northeast Brazil for exaple, a $1 investment in writing materials and textbooks shortens the average length of time for a student to progress from second to fourth grade by .13 years. This translates into a reduction of total costs to produce a fourth grade student of $4.03.

Benefit-cost ratios for selected educational investment in Brazil: fourth grade (in US$)

		Savings realized per dollar invested (a)			
		Rural North-East		*Brazil (total)*	
Input	Per pupil cost	Low income schools	All schools	Low income schools	All schools
- School textbooks and printed teaching materials	3.41	4.03	3.12	2.86	0.81
- Buildings, supplies and equipment	5.45	2.39	1.84	1.69	0.47
- In-service distance teacher training	1.84	1.88	1.45	1.33	0.37

(a) The savings are estimated on the basis of savings in school years, costing 30 $ US per pupil and per year, to bring a pupil to the fourth year.

Source: Harbison and Hanushek (1988)

A. Paths and directions

Conscious of the fact that in the area of school textbook programmes there are more failures than successes, the seminar took care not to draw definitive conclusions stating what is good and what is not. It oriented its reflection more toward the search for several key ideas, with a view to mapping out and managing a process of transition to a newly created dynamism.

I. Taking textbooks into consideration at the highest level of planning is indispensable

> "The school textbook was often the problem of those ministry officials who had lines of credit for the purchase of school supplies and materials. The resources are often decentralized and allocated directly to those with immediate responsibility, school principals or education superintendents, and then it is up to them to manage; in some countries, there is now a growing tendency to centralize this operation of deciding which textbook to buy". [Discussion participant.]

1.1 *The need for budgetization*

As we have said at the outset, it is necessary to treat the textbook *as an investment*, even if this investment is paid for by external aid or user contributions.

The lack of specific budgetization, with resources allocated to textbooks mixed up with those set aside for supplies and other materials, and often spread across different divisions so that the global picture is unclear, largely explains why school textbooks have not yet been given a high priority.

Therefore it is indispensable to have specific budgetary lines allowing for aggregation at the central level, and not just at the level of some particular department or division.

> "Decisions on educational curricula that affect books to be produced or printed were never entrusted to educational planning, but rather to the general management and to the superintendents for basic, general secondary and technical secondary education, with planning in this educational field being limited to determining the internal efficiency of the system, with no regard for the pedagogical content of the material." [Contribution Deogratias S110/17.]

Non-budgetization makes it extremely difficult to move from an externally funded project to a development programme relying on national resources, while budgetization offers *some guarantee of stability and continuity*

1.2. Guaranteeing equality of access

Central planning must guarantee access to textbooks, taking into consideration:-

- The physical and geographical problems involved in distribution;

> "Distribution difficulties are so severe in some countries that it is probably better to provide for a three to five year period of use, with the same textbook serving several cohorts. One should also avoid centralizing the production of exercise notebooks and other supplementary materials." [Discussion participant.]

> "Commercial supply for parent purchase inevitably concentrates on the richer, urban, easily distributable areas of the country and often ignores the poorer, rural, difficult acces areas." [Contribution Read S110/2.]

- The purchasing power of families: Should there be a free textbook policy? If this is not possible, should the expense be born in whole or in part, with appropriate subsidies, by the family?

- The low enrolment of certain pupil categories, such as the handicapped or pupils from an ethnic minority, as a result of which professional publishers, whether public or private, do not take these minority groups into account;

- And of course, *the concern for equity*: without intervention by central planning, the poorest pupils or those from disadvantaged rural areas are the ones most frequently neglected.

1.3. Economic data

> "In economic terms, it is a question of promoting a 'second best' approach, that is, rejecting the ideal solution that one cannot afford, and looking for the best possible compromise: which 'quality' aspects is one prepared to give up on, in order to ensure availability of textbooks." [Contribution Orivel S110/11.]

Taking into account the results, the cost/effectiveness criterion presupposes openness and even training of planners. How can textbooks be brought into the level of school policy choices if planning officials do not speak the same language as experts, if they refuse to become involved in logistics or execution? The number of textbooks per pupil, the amount of the expenditure per pupil per year - these are concrete problems that the planner must confront.

1.4. Statistical data

The central planning office must also ensure that it has the statistical information required to make an accurate diagnosis of the existing situation, and to determine needs.

For this purpose, it must equip itself with specific tools for quantitative (annual statistical survey, polls, etc.) and qualitative (summary of inspection reports, etc.) data collection.

Box N° 4: Diagnosis and computation of needs

Diagnosis

Knowledge of supply and demand.
- Who pays? Who buys? Who gives? Who receives?

Quantitative data: Annual statistical survey and polls.
- Number of books per pupil, per class, per school.
- Regional disparities.
- Duration of use (by day, by year; - number of years).
- Year of acquisition of existing textbooks.

Qualitative data: Inspection report.
- Type and time of use.
- Teacher qualifications.
- Consistency between textbook and curriculum.

Knowledge of foreign markets.
- Imports versus national editions.

Computation of needs

Taking into account unavoidable constraints and priorities.
Decision support for a series of possible choices:
- How many textbooks per pupil? What is the minimum?
- Duration of use of a book;
- Books by level, by subject;
- Number of pages, number of colours;
- Illustration quality and quantity.

Implementation of models for forecast planning.
Number of years to meet needs with national edition.
Parallel solutions while awaiting national edition.
Where to start? Which subject? What level?
Taking all costs into account:
- conception and design;
- publication;
- production;
- dissemination;
- delivery;
- teacher training;
- evaluation.

Source: E. Brunswic and J. Valérien. IIEP Annual Training Programme 1989/1990.

II. Macro-economic approach

Up to now, too many projects have been limited just to the school textbook area, whereas it is part of a broader field, that of books in general. It is now generally accepted that the textbook is an essential component of a national book policy, and that there can be no real book policy in developing countries if school textbooks are treated separately. This is a reason to strengthen the inter-ministerial aspect of the problem, by bringing in other ministries (Finance, Planning, Culture, Industry, etc.) in addition to education.

As a result, UNESCO, like other co-operation agencies, includes *sectorial studies* covering books in general in its project preparation.

> "It is becoming clear that there is a need to conduct studies and overall analyses of the book sector as a foundation for any policy to develop school textbooks and books in general. These studies should include:
>
> - Statistics;
>   Government policy parameters - educational, financial, political
> - Skills and resources - Authorship, publishing, pre-press, manufacturing, raw materials, distribution, usage, training needs;
> - Levels and sectors - Primary, secondary, tertiary, literacy, technical/vocational etc. libraries, school, university, research, public etc.;
> - Outputs - texts, teacher's books, supplements, consumables;
> - Law - Copyright, contracts, trade law, protectionism;
> - Impacts - Educational, cultural, economic, political.
> - Some debate on methodology - but now plenty of previous experience to go on.
> - Key issues:- who does it? when does it happen? Who does it go to? Need to distinguish between policy and technical issues. The potentially corrupting influence of finding agencies i.e. opeating to the wrong time scale concentration on things not skills.
>
> Book sector studies must be followed by a medium level/long term *book development policy*." [T. Read, working group report.]

A book policy must fit into well defined economic prospects.

III. The textbook must no longer be considered solely in terms of the product, but also in terms of the process

This means that one must now abandon yesterday's vision, which gave priority to production by promoting the establishment of large printing shops, often on the premises of the ministry of education.

One should, on the contrary, promote the conception and design phase, treating it as a real and indispensable investment. Technology transfer remains necessary, but it starts with the non-material procedures that lead to mastery of the publishing function. What is important now is the ability to draft and having manuscript authors available, to build up a publishing capacity leading to genuine independence, whatever the status of education -- state controlled, centralized or decentralized. The production chain will follow after.

IV. It seems indispensable better to separate the publishing function from the "curriculum development" function

In many countries, specialized 'Pedagogical Institutes' have been set up to take charge of curriculum development (drawing up the teaching programmes), teacher training, and the production of teaching materials, including school textbooks. Experience shows that cohabitation within the same structure of the curriculum and publishing functions leads to a distortion or a deviation, whereby the pedagogical institutes may have more and more manuscripts, but still as few textbooks as ever.

> "The functioning of the Curriculum Development Department was pointed out as a key area, which needs to be addressed. In most countries SIDA does not support this part of the production process. It was noted that the fact that the Curriculum Development Department and not the publishing house is responsible for the writing of the manuscripts is to the detriment of the whole production process. Moreover, the staff of the Curriculum Development Department is usually not active teachers and thus generally lack pedagogical comptence.
> [Contribution SIDA S110/10.]

The curriculum function encompasses the selection of contents, the establishment of progressions, the search for teaching programme consistency by (horizontal) level and by (vertical) discipline or subject, making allowances for specific socio-cultural data, and for data pertaining to teaching conditions, such as the timetable, the school calendar, pupil levels, and teacher qualifications.

The publishing function is different in nature: it is a question of managing an inter-disciplinary team, of delivering a product at a given cost, in a given time and taking into account numerous technical constraints, of making allowances for regulations, of negotiating contracts, etc.

> "Applying theoretical principles from the communication sciences, the psychology of learning, and psycholinguistics or semiology, textbooks organise their content sequentially, condensing information and presenting activities and exercises in an incremental fashion, so that learning can transcend the purely informative level... All of this internal logic should become visible through graphic design, reflected in the layout and external presentation of the book."
> [Contribution J. Munoz Juan S110/12.]

Very often the broad outline of the curriculum is determined from textbooks brought in from abroad, whereas the opposite should be the case -- the textbook should be based on the curriculum. Moreover, an edition published by a curriculum development centre cannot be correctly evaluated, since the evaluation is the responsibility of the curriculum centre itself.

The more and more frequently applied solution consists in taking textbook publishing out of the education sector, and entrusting it to para-public or private publishing houses.

V. Priority must be given to the all too frequently neglected distribution function

> "The distribution process should be analyzed as a function of three criteria: 1) the economic aspect, 2) inventory management, and 3) transport. These three aspects are all linked to one another and inter-dependent." [Contribution SIDA S110/10.]

In economic terms, one has to deal with the very major problem of whether textbooks should be free of charge. The International Conference on Public Education, meeting in 1959 at the Geneva International Education Office, has this to say about school textbooks in its recommendation N° 48:

> "22. The free distribution of school textbooks to all primary school pupils is the logical corollary of the principle of compulsory schooling.
>
> 23. In the countries where, for financial reasons, this principle cannot be fully applied, free textbooks should be supplied as widely as possible for all those categories of children who have difficulty in obtaining them ...."

These problems are so significant that intervention by the planning department must support and supplement the measures adopted at the local level by pupils' parents, by teachers and by school co-operatives.

> The problems of distribution are also problems of infrastructure.
>
> "The poor distribution infrastructure for books in developing countries is a major factor in the restriction of books for reading to basically urban areas. This is, mainly, due to the high cost of transportation systems. In fact, it is also due to the lack of book distribution and selling institutions outside major towns." [Contribution Kipkorir S110/9.]

It turns out that the more logistical problems a country has, the more the central planning department must intervene to guarantee that textbooks are available and accessible for all pupils.

VI. Comparing the situation with what exists in industrialized countries suggests promoting the establishment of non- governmental networks

In industrialized countries, numerous *association, trade union and vocational* networks play a very important role with respect to school textbooks, and usefully contribute to maintaining a balance, by constituting a proposing force, a means of pressure, and an instrument of control to avoid excesses.

Such networks are usually non-existent in developing countries, while the state cannot have the capacity to ensure all the functions fulfilled by such an arrangement.

VII. Planning must organize a synergy of the possible actions by all partners, in order to achieve 'general mobilization' in favor of books and textbooks

All too often, the *decision-makers* are not aware of the importance of the textbook problem.

> "In the course of a twelve-year period devoted to school book and textbook projects in seventy countries, I never once met a minister of education or an education secretary-general who had enough information to take a political decision in this field. [Discussion participant.]
>
> "Individuals vote, books do not". [quoted by Tony Read, S110/2.]

On the other hand, users should also be more involved. In particular, teacher training should include an introduction to the utilization and maintenance of textbooks. Such utilization is not an innate skill, even though many people think that a teacher's use of a textbook is something self-evident. Training centers, such as teacher's colleges, teach the use of audio-visual means, and even computers, but very rarely the use of a school textbook!

Families should also be made more aware of the importance of school textbooks and of books in general. This can be done on the occasion of a public distribution of textbooks to pupils, by turning the event into a celebration; or by urging parents to make sure that their children respect their textbook and take good care of it, if only by the simple fact of putting a cover on it.

Book exhibits can make a significant contribution to such awareness raising.

> "...a book exhibition can serve as media from which many can take the benefit. Through the books displayed one would realize how far the advancement in book production has been achieved.... Such an information would be of much use to the researchers and writers. ...the books showed off in the exhibition could serve as challenging examples for those who are involved in the production and selling books.
>
> Holding a book exhibition on the right time, in the right place, and the suitable types of books within the local daily concern, will certainly be able to give a great support to invite and increase the public interest in reading books."
> [Textbook publishing in Indonesia, S110/19]

More and more national 'reading plans', involving all partners and aimed at all partners, including pupils and adults, are being implemented.

Box N° 5: The components of a national reading plan

Aimed at the school

- A "pedagogical conference" or superintendent's instructions to give the very highest of priorities to the teaching of reading;
- Urging every school to set up an educational project centered around reading;
- The supply of books - organization of a "book festival"; school library.

The example of Thailand

The schools receive annual allowances by "groupings" of 6 to 11 schools. Some groupings used their allowances to buy chests containing a selection of reading books for each school. Rotation makes it possible for each school to have a library chest for 15 days, giving it access to a broader selection of works (certain books may be borrowed by third parties, that is, members of the community). The chests provide effective protection against the sun and rain.

- Using the media to support the teacher's efforts.

The example of El Salvador 1990/91

Using the radio to support the teaching of reading to children. The Ministry of Education is responsible:

- for the preparation of broadcasts;
- for buying time on private radio stations;
- for finding sponsors to underwrite the broadcasting expense;
- for ensuring the co-operation of the Artists' Union and bringing in the best-known names (the most popular story-tellers, singers and actors);
- for providing the information teachers need to make best possible use of the programmes.

Aimed at public opinion

- Orchestrated media campaign by the written press, radio and television;
- Exhibits, conferences, public events;
- Assistance for the publication of books for children, appeals to national authors;
- "Reading bus" or "reading train" with an event at each stop;
- Creation of reading centers, libraries (to increase the number of places where people read);
- Competitions.

Aimed at adults

- Specific literacy campaigns for different environments (urban disadvantaged, rural, coastal, etc.);
- Recourse to distance and/or non-formal teaching;
- Use of the media (press, radio, television) to reach both local trainers involved in the plan and users.

Aimed at institutions

- Inter-ministerial working party to co-ordinate the plan of action of each ministry involved (culture, defence, etc.);
- Giving a new impetus to the "National Book Center";
- Organization and development of the professional publishing sector.

Source: Based on various national reading plans.

B. Thresholds and limits

Whatever the problem tackled by the planner, the optimal solution is found, as we have said, between a threshold and a limit.

I. Financing, cost, cost reduction

Given the growing shortage of available resources, the emerging general trend consists of asking families to contribute financially to the cost of textbooks, while at the same time systematically looking for cost reductions.

This financial contribution of users is generally aimed at constituting a revolving fund, to ensure the continuity of the school textbook development programme. Numerous questions arise in this respect:

- How should the amount of the contribution be determined?
- How should this amount be paid in and collected?
- What is the foreseeable impact on demand?
- How can one ensure some degree of equity for children of the most disadvantaged families?
- What type of subsidy should one apply: *by product* (either directly, through a cash payment, or indirectly, by paying certain salaries, by providing tax exemptions, etc.); *by user*, through a 'study allowance' for the poorest parents, via the school co-operative, or via the school?

What is the limit to possible participation by users?

> "Textbook prices in French speaking Sub-Saharan Africa range from 1,200 to 3,000 FCFA, that is, US$4 to 10. For a western family, these prices may seem quite reasonable, since the expenditure involved in acquiring 4 books represents between 1 and 3 per 1,000 of the per capita GDP. Things are not quite the same for a family from the traditional African sector. For these families, which still constitute the majority of pupils' parents in the region, sometimes more than 80%, the same expenditure consumes between 8% and 20% of the annual per capita income, and an even greater proportion of the monetary income. It is as if a French family had to spend the equivalent of US$330 - US$830 to acquire a textbook. Would they do it? Almost certainly not, and this explains why African families from the traditional or informal sector, representing 65% to 85% of the population depending on the country, do not buy textbooks."
> [François Orivel, IREDU, 1989.]

The 'acceptable' price for families quite obviously varies from country to country, and it is not possible to compare the price of a textbook in Finland (the European country that spends the most on teaching materials per pupil) with that prevailing in highly disadvantaged countries, such as the African countries to the south of the Sahara.

China, India, Morocco, Mexico and Tunisia produce textbooks at a unit cost of just US$1, while the Philippines manage an even lower cost of US$0.55 for some series.

According to some surveys mentioned by a participant, in one Asian country textbooks are only the fifth most significant item of expenditure for a pupil's family, coming after the uniform, transport, sports equipment and supplies.

From the planner's point of view, textbook cost is not limited to the unit cost of the imported or nationally produced book. The cost of textbooks per pupil per year is a more important datum for him.

Striving for cost reduction is necessary, but it should not be limited to the book as such, rather encompassing the overall system of design, production, distribution and utilization.

> "When the dimensions of locally available paper do not correspond to those of locally available machines, the loss can be as much as 50% to 60%, or even 70%, of the purchased paper, for the simple reason that the dimensions of the book do not correspond to those of the paper and the machine." [Discussion participant].

Box N° 6: The cost components of a textbook in an industrialized country

At the beginning of the 1990/91 school year, a French magazine conducted a survey of publishers in order to break down the price of a textbook. The example is that of a 272-page science book for 16 year-old pupils, sold at a unit price of 82 francs, and put out by 3 publishers with a print run of 56,660 copies.

Copyright often 10%, but calculated on the actual number of sales, whereas one copy of the textbook is given free of charge to each teacher as a specimen	7.00 FF
Manufacturing costs composition, photogravure, layout, setting, paper, ink, binding, illustrators' royalties, etc.	16.70 FF
Circulation and advertising specimens sent to teachers and 'educational representatives' who visit teachers	4.30 FF
Distribution costs inventory, distribution to bookstores	6.00 FF
Publishing costs publishing house staff remuneration and overhead	9.40 FF
Publisher's profit	9.60 FF
Bookstore margin The discount given to bookstores is administratively set at 31.5% of the selling price. This discount covers: inventory costs, cash-flow costs (the bookstores pay for books as ordered and are reimbursed for unsold copies only after a certain period), expenses and overhead.	24.50 FF
Duties and taxes (VAT*)	4.50 FF
Total	82.00 FF

Source: *Science et vie économie* Magazine N° 64, September 1990. Survey carried out by Jean Drouin.
*Like other books, school textbooks bear a VAT charge of 5.5%.

For instance, at the production level, there is no evidence that using colour enhances the performance of the textbook.

> "In a sense, the contemporary concept of the textbook is a Western idea, and most Third World nations depend on notions of textbook design, production and appearance initiated in the industrialized nations. The idea that texts should have full-colour illustrations, be printed on long-lasting paper, be accompanied by work-books printed on newsprint, and that they should generally be hardbound rather than paperbound, these are all Western concepts."
> [P. Altbach, Prospects XIII, 3, 1983].

The number of textbooks per level, the number of textbooks per pupil, whether or not textbooks are shared -- all these are factors that should be taken into account. For example, experts agree that, under circumstances of severe shortage, one textbook for every three pupils is a minimum threshold.

> "In terms of school effectiveness, there is no significant difference between having one school textbook per pupil or one textbook for every two pupils. Having a high quality school textbook for every two pupils, that lasts for four years, gives an annual unit cost reduction coefficient per pupil of eight." [Discussion participant].

Let us stress once more the issue of economies of scale: a set of textbooks for a large number of pupils (national edition, sub-regional joint edition, etc.) has a unit cost less than that of a school book produced for a numerically limited population (minorities, special groups, etc.). In the latter case, state intervention (partial or complete subsidy) may well be necessary and justified.

II. Quality and effectiveness

> "For 80 countries in the world, the problem of quality arises in terms of several very difficult questions: What can one consider as the minimal conditions for education to be meaningful? What is the minimal threshold below which it is no longer possible to speak of education?" [Discussion participant].

The quality of a textbook is not an absolute concept: there is no international standard in this field, and one has to be able to resist a "terrorism of quality". *The quality of a textbook is necessarily a relative concept, and a function of its utilization in a given situation.* Depending on whether one has a single objective or a range of broader objectives, depending on whether one wishes to use a lecture method or a less directive educational approach, the utilization conditions will be different and the effectiveness of the same textbook will be different. This brings in the notion of cost/effectiveness. In general, the less qualified the teacher, the more the textbook has to be directive, and conversely, the better trained the teacher, the more the textbook should be adapted to active education.

Thus it is appropriate, when one speaks of the notion of quality, to distinguish among various aspects:

- the physical quality of the textbook,
- the editorial quality,
- the educational quality,

- the scientific quality,

and always to have in mind the circumstances of the textbook's use, which may be:

- individual/collective,
- at school/at home, etc.

taking into account, as much as possible, the level of training of the teachers and the level of the pupils.

The effectiveness of a given textbook can be enhanced by a number of external means. For example, the physical quality of a book can be reinforced by maintenance (covering the book, using it carefully, etc.), while the educational quality is improved when an insufficiently qualified teacher is supplied with a teacher's course book.

Quality can be encouraged through continuous research on the evaluation of the textbook. Pedagogical quality can be enhanced by a call for tenders, in the form of a competition for the drafting of a given manuscript (prize for the best manuscript, etc.).

The thresholds and limits are a function of the utilization conditions and the real context: the same book may be of sufficient quality for a given environment, and not satisfactory in a different context.

> "...the problem of textbook quality has important implications in educational policies, in the interpretation of the educational function of textbooks, in the practical application of textbooks in the classrooms, and in the way textbooks are designed and evaluated." [Contribution Munoz Juan S110/12].

III. Textbook by level and/or by discipline

Abundance of textbooks by level and by discipline, competition among publishers for a textbook for a given discipline and level, freedom of choice by schools, or even by teachers themselves -- these are characteristics of the consumer economies of industrialized countries, characteristics that of course make no sense in developing countries.

But the single textbook situation (only one textbook available per level and per subject) prevailing in developing countries can, if the planning department does not intervene, lead to bureaucratic deviations and monopolistic situations. In order to avoid them, it is possible, for example, to generate rivalry among potential authors in the drafting phase, and competition among publishers for the production. Similarly, certain dangers can be avoided by taking care not to entrust evaluation to the publishing sector, so as to preserve the necessary independence of judgement.

> "The drafting of textbooks is entrusted to teams consisting of teachers and inspectors. The manuscript is submitted to the administration for assessment. Before the final drafting, lessons and exercises are tested by independent teams. The Marketing Commission then calls for competitive tenders from publishers." [Contribution Radi S110/13].

In a number of countries, adapting an existing textbook to the environment requires producing supplementary documents. For example, a teacher's course book may turn out to be indispensable for actual application. In certain limited situations, the

teacher himself will have to write something to supplement the textbook, or even to replace it if the textbook is not available.

The teacher's course book is in a position to encourage local production of documentation by the teacher or by the school, in order that it be possible to use the same textbook despite strong local specificities, due for instance to geography (city, country, mountainous area, coastal region, forested region) or to cultural and linguistic aspects. If these specificities are too strong, modular production (publishing by section) may be an effective solution. This is often a sensitive issue.

The number of textbooks per basic education level, as set out in official instructions, is often high, and may amount to an unnecessary luxury from the cost/effectiveness point of view.

> "Educators are guilty of having taken decisions regarding school textbooks and learning without adequate reference to the cost factor. Several developing countries sometimes require 12, 13 or 14 textbooks for the fifth year of primary education, covering instruction in the areas of politics, health, population, drugs and road safety, despite the fact that they do not have enough money to provide (just) three textbooks." [Discussion participant.]

Nevertheless, there is a minimum number of books per level, with a decreasing order of priority, such as: (i) reading, (ii) arithmetic, (iii) social sciences, etc..

IV. The authors and copyright

For the preparation of a textbook, should one call on a single author, a team, a commission? How should authors be remunerated: salary, bonus, lump-sum royalty, royalties proportional to the number of books, etc.? Each solution has its advantages and disadvantages, its defenders and its critics.

How should one establish the criteria for reaching a decision?

Is it still possible to treat a primary education textbook, with a very large print run, as a work of art or a creation, subject to payment of royalties under copyright? We know, after all, that a textbook is an industrial product requiring, like an automobile or most of our tools in daily use, the involvement of numerous specialists.

> "One cannot treat a primary education textbook like a literary work or a novel, for it is an industrial product. It is not a work by one author, but the result of a multi-disciplinary team's effort. Before producing millions of copies of a textbook, one has to invest in design and development, like for any other industrial product, and yet design budgets are often non-existent." [Discussion participant.]

This does not mean that it is not necessary to invest in the textbook as an industrial product. On the contrary, a concept and design effort, with experimentation preceding the definitive edition, is perfectly justified for an object produced in a million copies! And yet it has to be admitted that all too frequently the concept and design budgets, that is, the initial investment, are much smaller for textbooks than for any other industrial product.

One participant quite rightly spoke of "writing factories", involving numerous professional specialists (scientific content expert, communicator, graphics expert, layout expert, learning expert, education scientist, without forgetting the user pedagogue) collected into a team by the publisher.

V. The textbook and the curriculum

One needs time to develop a curriculum, just as one needs time to produce a new textbook. A change in curriculum normally leads to a change in the textbook.

Thus the time factor requires avoiding minor curriculum changes, because the production of new textbooks would generate excessive costs and pointless expenditure.

In the past, especially when teams responsible for curriculum development worked in teacher-training centres, it was fashionable to revise the curriculum so frequently (often every two years) that neither publishers nor teacher trainers could keep up.

Thus there are conflicting requirements in this regard that must be reconciled.

> "One of the main problems of the textbook production in the developing countries is the centralized approval procedure..... (This) not only causes delays in the production process, but it also makes the production process very expensive as the manuscript and not the synopsis is undergoing the approval procedure, although at this stage it is difficult to change the existing manuscript."
> [Contribution SIDA S110/10.]

All too frequently, the curriculum requires a textbook with too ambitious a content, exceeding pupils' assimilation capacities: the level is too difficult.

Box N° 7. Textbook difficulty in developing countries

A study commissioned by the World Bank examined the level of difficulty in reading and mathematics textbooks used in grades 1, 3, and 5 in 15 developing countries. It concluded that expectations for student achievement in the earliest grades in both reading and mathematics were inappropriately high, and that the steps from one concept to the next were very large, with few intermediate stages.

Table: Skill levels taught in Grades 1, 3, and 5 mathematics textbooks in developing countries (proportion of pages in text), and proportion of Grades 4 and 8 US students achieving at each mathematics skill level, 1986

	% of textbook pages			% US students mastering skills	
Skill level	Gr 1	Gr 3	Gr 5	Gr 4	Gr 8
Pre-numbers	38	1	0	n.k.	n.k.
Simple arithmetic facts	41	8	1	98	100
Beginning skills and understanding	18	46	16	74	99
Basic operations, beginning problem solving	3	24	18	21	73
Moderately complex procedures, reasoning	0	22	65	1	16

n.k. = not known

Source: Cope J., Denning C. and Ribeiro L. (1989). *Content Analysis of Reading and Mathematics Textbooks in Fifteen Developing Countries*, London Book Development Council (Processed).

Table: Stages of reading development and skill levels required for language textbooks in Grades 1, 3, and 5 in developing countries.

	Typically taught in	Proportion of textbooks pages %		
Skill level	U.S.A.	year 1	year 3	year 5
Pre-reading	Pre-school	57	0	0
Decoding	1-2	34	10	. 0
Fluency	2-3	9	62	62
"Learning the new"	4-8	0	28	38

Source: Cope J., Denning C., Ribeiro L.: op. cit.

VI. Short, medium and long term

Time is a determining factor in any school textbook policy. The adoption of a poor strategy can have damaging repercussions for a long period. To take just one example, that of scientific training at the secondary education level, it can be said that what happened in the eighties in many countries is going to have significant consequences over the ten years to come, whatever corrective measures it may be possible to take immediately. As far as school textbooks are concerned, the operative unit of time seems to be the decade rather than the year.

This means that when a decision is taken, it is necessary to provide at the same time for a transition and interim solutions, and to draw up a plan setting out successive stages of the decision's actual application.

VII. Teacher's textbook, book or guide

The teacher's book is an essential factor in improving results, and in good utilization of the school textbook. A recent study, carried out, to be sure, in industrialized countries, has shown that the only way of having an innovation in the educational process accepted by teachers is to act through the teacher's book, while ministerial directives had no effect on teachers.

Moreover, there is an interaction between the teacher's book and the pupil's textbook. When the guide is not available, there is a strong tendency to bring into the pupil's textbook a body of data that is in fact addressed to the teacher. The analysis of numerous textbooks shows that a number of things are comprehensible only to the teacher, and hence that it is possible to shorten the textbook.

The teacher's guide can also solve the problem of a differentiated educational approach, by proposing different ways of using and reading the textbook. The teacher's guide is more the responsibility of the curriculum development and training centres than of the publisher, or even the author. For example, different countries may produce specific guides for one and the same textbook (especially when the book is imported).

VIII. Responsibility of the state, and of para-public and private sectors

The state is responsible for guaranteeing minimal acceptable school conditions, and hence, in particular, access to textbooks. In this field it can either finance directly, if it has sufficient resources, or devote scarce available resources to the generation of additional financing (loans, foreign aid, family contributions, etc.). Its responsibility is to seek a way of promoting equity, so as not to wrong minorities, and not to favour children of wealthy families to the detriment of pupils most disadvantaged in economic, social and cultural terms.

This fundamental responsibility by no means suggests that the state should take everything in hand: on the contrary, experience has often shown that the state cannot simultaneously play the entrepreneur or business leader, the road haulier and the inspector: all it can do is avoid creating monopolistic situations.

No expert would continue to recommend unique and complete intervention by the state in the production of school textbooks, and even in the most centralized countries, the state is resorting more and more to para-public and private sector sub-contracting.

A totally public system is often randomly subject to the pressure and the will of decisions by finance and education ministries, which are annual, whereas the programme must necessarily cover a longer period.

A totally private system, based on profitability, neglects insolvent groups and disadvantaged regions (rural areas, minorities, etc.), and often tends to re-utilize existing resources (re-publication of old, outdated textbooks, etc.).

The right balance must guarantee that the supply of textbooks will not go by the wayside as soon as a budgetary constraint is encountered.

IX. Centralization, decentralization

How can one reconcile decentralization and centralization? What is the precise impact of one or the other system, not only on the concept and design phase, but also and especially on distribution, which remains one of the most difficult and least well resolved problems.

The more logistical problems a country has, the more it has to resort to centralization for the sake of effectiveness. But there are no miracle solutions: a ten-ton truck is not appropriate for delivering 500 kilos of books, and over-burdening superintendents' offices, which are often short on resources themselves, is not satisfactory either.

> "It is recognized that the more logistical problems and difficulties a country has, the more it is forced to reconcile the imperatives of decentralization with the need for very strong centralization, to support and control distribution. If everything is decentralized, some regions will solve their problems, but others will no longer have access to textbooks." [Discussion participant].

X. Sub-regional co-operation

Sub-regional co-operation allows for economies of scale. It is often difficult to achieve, to the extent that it requires the agreement of education ministries and their publishers. It is nevertheless possible, in particular for training and reference material aimed at teachers, and especially when there are regional standards regarding the curriculum, as in the Caribbean, for example.

C. Choices and priorities

The seminar resulted in a number of proposals or recommendations, suggesting choices and priorities appropriate at different levels. We now successively review the suggestions made to national departments, to inter-governmental organizations and to agencies, before concluding with the natural priorities for the IIEP.

I. Involvement of national planning departments

The processing of school textbooks by central planning departments must be done in each country, within the framework of a *national book policy* that goes beyond just the ministry of education, and requires co-operation among various affected ministerial departments (Planning, Finance, Culture, Industry/Crafts, etc.).

1. A central issue is that of budgetization

   Participants recommend that costs related to school textbooks be specifically taken into account when the education budget is drawn up.
   [Seminar proposal]

2. Putting the stress on design rather than production.

   "Given the importance of national production of relevant school textbooks, publishing houses need the assistance of funding agencies more than printers. Such support for publishing houses is more a political than a financial issue, given that publishers need only a small relative share of the state's budget."
   [Contribution SIDA S110/10.]

3. Diagnosis and the study of requirements are based on the annual statistical survey, which must take the current situation into account, in both quantitative and qualitative terms.

4. Distribution often remains one of the unsolved problems.

   Aspects connected with textbook distribution should be the subject of careful reflection, with a view to highlighting strategies suitable to the national reality as well as to local specificities. Special attention should be paid in this respect to the best way of handling the particular difficulties that characterize certain rural areas, with a poorly developed communication infrastructure.

   An effective strategy for making school textbooks available should include matters related to textbook maintenance, as well as the impact of maintenance of the physical lifetime of textbooks.
   [Seminar proposals]

5. Investigations should be conducted in order to study the conditions of optimal adjustment, for a given political, cultural, social and educational context, between the price at which textbooks are offered and the price that the public is prepared to pay.

6. Finally, cost calculation should encompass not only the costs of the various functions of the textbook production chain (design, publication, distribution, etc.), but also the costs of bringing the textbook to the pupil, and of training teachers.

II. The roles of co-operation agencies

1. The orientation of school textbook development projects should be shifted, with priority given to the concept and design stage and to publication.

> *Measures should be adopted to equip developing countries with a genuine publishing capacity, that could constitute the basis of a local book industry.*
> [Seminar proposal]

2. Publishing functions should be separated from those pertaining to the curriculum. This should result in substantial modifications in the design of both bilateral and multilateral projects.

> *Training and support activities by international organizations with respect to strengthening curriculum development and textbook production capacities should be clearly separated, so as to avoid the risk of going off track, which can result from confusing these two functions.*
> [Seminar proposal]

3. Multilateral co-operation has the responsibility of playing the role of intermediary, of interface, or even of broker, to promote Public/South and Private/North co-operation.

> *In organizing themselves around a competent industry, be it privately or state owned, North-South partnership activities would certainly gain a lot in credibility and in effectiveness.*
>
> *Seminar participants also stressed the positive role that international organizations could play to promote relations between the national demand and publishing houses.* [Seminar proposals]

4. Co-operation agencies should extend their support to the establishment of association and professional networks, capable of becoming involved in school textbook development programmes.

5. One should look for synergy among the various project oriented inter-governmental organizations, and between bilateral and multilateral co-operation. Inter-institutional co-operation should aim for more joint action and more consistency, given that there are many countries where textbook producing projects (for health education -- assisted by WHO, for the environment -- assisted by UNDP, for education in population issues -- assisted by UNFPA, for combating drugs -- assisted by UNFDA) co-exist in mutual ignorance, while at the same time there is often a shortage of general textbooks for basic education.

6. Co-operation between planners and publishers should be encouraged. On the occasion of co-operative actions, it should be possible to organize the necessary transfers of expertise and technology, indispensable for the creation of national publishing capacities. Joint reflection and action by planning officials and major publishers would serve to facilitate the emergence of transparent rules pertaining to contract management and copyright policy.

7. All these recommendations have numerous implications for inter-governmental organizations and external funding agencies, which should be induced to re-orient not only their textbook development projects, but also their projects pertaining to teacher training and curriculum development.

III. The need for a data bank with easy access and a research programme

1. National planning departments must have easy access to an information bank, to be constituted on an urgent basis.

> *Given the extreme shortage of data pertaining to the actual conditions under which school textbooks are made available, the participants recommend to IIEP that it do everything possible, in co-operation with the specialized divisions of appropriate international organizations, and in particular UNESCO's Office of Statistics, to constitute an easily accessible information base, including not only quantitative data (number of books per pupil, availability by region, costs, etc.), but also qualitative data (technical and educational quality of textbooks, relationship with curricula, etc.) from the school textbook field.*
> [Seminar proposal]

2. As part of the follow-up to the Jomtien Conference, UNESCO has already undertaken to collect statistical information about elementary education: 7 of 22 items pertain to school textbooks. (See Appendix II, page 31)

3. Encouragement should be forthcoming for the implementation of a new set of research activities.

> "It is desirable to undertake technical research, and to collate and disseminate existing research, pertaining in particular:
>
> - to the impact of school textbooks on school effectiveness;
> - to the impact of supplementary teaching material on school effectiveness;
> - to the criteria of durability;
> - to the utilization of textbooks, etc.
>
> There is also a need for information regarding:
>
> - the way one organizes a sectoral book study;
> - funding mechanisms;
> - alternative ways of subsidizing;
> - the way one organizes a system of primary school libraries.
>
> [Working group report]

> *Participants put the stress on the importance of initiating a research process integrating all aspects of the issue of books in developing countries. Such research should pay particular attention to taking into consideration the educational and physical quality of textbooks, by integrating the notion of a minimal quality threshold, without which any quantitative evaluation becomes meaningless.*
>
> *It should be easily possible to relate information about school textbooks to other data that give a good sense of the regional, national and local context in which the textbooks are produced and utilized.*
> [Seminar proposal]

4. Very close monitoring of experiences involving desk-top publishing with computers is necessary, given the probable development of new technologies in the publishing sector.

IV. Encouraging sub-regional and regional co-operation

1. Joint publishing is still difficult: a number of measures should be adopted to encourage it:

- exchange of experiences. What are the successful experiences?
- co-ordination of performance standards at the sub-regional level, to the point of achieving sufficiently similar teaching programmes to allow for the joint publication of teacher's guides, and then of pupil's textbooks;
- support for the establishment of publishing structures, as co-operation among publishers is easier than among national institutions or governmental bodies.

2. Copyright should be restricted, as basic education textbooks can no longer be viewed as created works.

3. Finally, access to protected works, recourse to photograph archives and to documentation centers should be facilitated.

V. Role and priorities of IIEP

1. The seminar put particular stress on IIEP's role in the areas of training and information dissemination.

> *Aware of the need for education planners effectively to take into consideration the problems involved in making school textbooks available, participants recommend that IIEP include, in the core of its training courses organized for education planners, a module to raise their awareness of the various aspects of textbook design, production and distribution. This module would include, inter alia, an introduction to the general issue of books in developing countries.*
>
> *This basic module could usefully be supplemented with optional training, during which participants would have an opportunity to delve more deeply into areas such as the publishing process, distribution problems specific to developing countries, the legal aspects of copyright and joint publishing contracts, qualitative evaluation of textbooks, etc.*
> [Seminar proposal]

Apart from its annual training course, IIEP is in a position to raise the awareness of decision-makers, and to support national planning bodies with decentralized training at the sub-regional or national level for planners and administrators.

> *The participants suggest that UNESCO do everything possible to offer various forms of information about the school textbook design, publication and distribution processes, as well as the general issue of books in developing countries.*
> [Seminar proposal]

2. Three priorities for IIEP

Among the very many items on the agenda taken up by the seminar, IIEP is careful to limit itself to activities consistent with its specific character.

2.1. In the first place, the Institute is in a position to contribute to a new information collection exercise, to constitute the data bank that is indispensable if national planning departments are to be able to take access to school textbooks into consideration.

For example, IIEP can promote the drafting of monographs aimed at describing the reality of the situation and the status of school textbooks in a limited number of countries, in order to outline, if possible, the main types of policies curently being implemented.

2.2. The second area of IIEP investment has to do with textbook funding strategy.

In this area, difficulties encountered because of declining resources make it even more necessary to act in a deliberate way, seeking both to reduce costs and to mobilize new resources, both from external aid sources and from users, while taking the greatest possible care to guarantee equality of access to textbooks.

2.3. Finally, the Institute must pay close attention to matters pertaining to textbook distribution. The dissemination of books presents a difficult problem, often resolved poorly or not at all. It is not up to IIEP to come down on the side of one solution or another, like a methodological guide, but to intervene in terms of issues and alternative choices for developing distribution policies.

> "Thanks to the seminar and its participants, the Institute now feels that it is better equipped to make its contribution, as a function of its own awareness, to the necessary dialogue that must occur for the most disadvantaged countries, and hence the ones that need it most, to have the best possible textbook development. [Conclusions to the seminar, J. Hallak, Director of IIEP].

Appendix I.

Textbook availability in selected countries

	Percentage of pupils not supplied with a book	Description	Distribution		
			Books supplied	Books purchased (with subsidy)	Books purchased (without subsidy)
Medium income countries					
Lesotho	-	About three pupils per book.		x	
Nigeria	98	Barely acceptable supply of books in Ibadan and Lagos. Only two books per 100 pupils in the rural regions of the North.	x		
Paraguay	67	One pupil in three has a book, one pupil in 50 has the required four books.	x		
Peru	67	Two thirds of pupils (in rural zones) do not have books.			
Tunisia	0	All pupils have copies of books that their teachers asked them to buy.		x	
Turkey	-	Good resources in the larger towns. On occasion there are textbook shortages in rural zones.		x	
Low income countries					
Burkina Faso	33	Cost of a French textbook (3 dollars) too high for a low income family.			x
Comores	67	One pupil in three has a French textbook.	x		
China	0	Each semester, every pupil receives a new textbook in each subject.		x	
Guatemala	75-100	One pupil in four had books in 1974, but there has been no further production for 10 years. Books have practically disappeared from classrooms.			
Equatorial Guinea	100	As distribution is poor, only urban schools have books.			
Haiti	75	Only one rural pupil in four has access to a textbook.			x
Madagascar	-	Most schools are short on textbooks. The available textbooks are old and in poor condition.		x	

Appendix 1 (contd.)

	Percentage of pupils not supplied with a book	Description	Books supplied	Distribution: Books purchased (with subsidy)	Distribution: Books purchased (without subsidy)
Mozambique	-	Resources are good in towns and scanty in remote regions. Prohibitive prices prevent pupils from gaining access to books.			x
Niger	-	The state supplies one French textbook for every four pupils.	x		x
Uganda	40	3,400 schools were still devoid of books after a World Bank project had supplied textbooks to 5,400 schools.	x		
Pakistan	50	Access to books is limited for pupils in rural zones.		x	
Central African Republic	-	National average of nine pupils per book, with pupils in rural zones having no books.	x		
Rwanda	87	One pupil in eight has a set of textbooks for Kinyarwanda, mathematics and French.		x	
Sierra Leone	25-65	In the provincial schools there are virtually no pupils with textbooks.	x		
Togo	100	The books are expensive and it is common for 20 pupils to share one.		x	
Zaire	-	Many schools do not have books for their pupils.		x	

Source: The Publishers Association, London, 1989.

Appendix II

Paris, December 1990
STE/Q/PRIM

united nations educational, scientific and cultural organization

STATISTICAL SURVEY
ON EDUCATION AT THE FIRST LEVEL

III. SCHOOL FEES AND SCHOOL BOOKS IN STATE SCHOOLS

9. Is enrolment in state schools subject to the payment of school fees?

- Yes ☐
- No ☐
- Partly (Please specify) ☐

_____
_____

If yes, what are at present the school fees?

Year .....
Annual amount .....
(Indicate the currency) .....

10. Are pupils granted exemption from school fees at the discretion of the :

- National authorities ☐
- Headmasters ☐
- Other authorities (Please specify) ☐

_____
_____

- No pupil is exempt from school fees ☐

11. Do primary schools charge any other fees (e.g. for school facilities, community-funded activities, etc.)? Please specify.

_____
_____

12. Are school books provided free of charge?

- Yes ☐
- Yes, but under certain conditions ☐
  (Please specify)

_____

_____

- No ☐
- No, but they can be bought from the school at a reduced price ☐
- Other arrangements (Please specify) ☐

_____

_____

13. Is the number of school books provided sufficient to meet the needs of :

- All the pupils (90-100% of the total) ☐
- The majority of pupils (60-90%) ☐
- Some of the pupils (30-60%) ☐
- A fraction of the pupils (less than 30%) ☐

Does this information cover all grades or only some grades?

_____

_____

14. Are school books issued by :

- The Ministry of Education ☐
- Other government agencies ☐
- Private publishing houses ☐
  - national ☐
  - foreign ☐
- A combination of the aforementioned sources ☐

15. Please indicate whether the information provided in 9 to 11 above refers to the country as a whole or whether it varies from region to region within the country.

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Part II

Selected papers presented at the seminar

Orientation note

Access by pupils and teachers to instructional materials, and particularly to textbooks, is a current problem which arises in acute form in developing countries.

A. The need to take textbooks into account at the central planning level

1. The provision of textbooks in developing countries follows a number of successive stages:

- The large-scale import of existing textbooks.
- The national or sub-regional adaptation of imported textbooks, such adaptations being published by multi-national companies established in the countries concerned (in the case of English-speaking countries) or not (in the case of French-speaking countries).
- National production, often undertaken by the public education system;
- The quest for systems matched to each national situation, having recourse to a variety of national institutional bodies (not confined solely to ministerial departments responsible for education) and to national and foreign public and private bodies.

In the light of accumulated experience (Valérien, J.V. 1989), it can be said that *nowadays we know how to publish and produce textbooks and instructional materials corresponding to specific national requirements*.

2. But the identification of the problems encountered and of the difficulties to be averted does not suffice to provide valid ways and means of meeting needs in the long term; nor does the transfer of publishing technologies. A number of developing countries still suffer from a shortage (or even an almost complete lack) of school textbooks.

The fact is that securing access to textbooks is a *sensitive area*, involving interests that extend beyond the strict confines of education and the teaching/learning process. Even within that limited field, where the use of textbooks to improve the quality of teaching is clearly demonstrable and recognized, numerous problems arise: writing, production, distribution, utilization, etc. For example, does one really know various forms of instruction are put over by the textbooks in question?

In industrialized countries there is a regulating factor resulting from the interplay that exists between the numerous protagonists involved (the public authorities and education regulations, publishers, associations of various kinds (specialized associations, associations of teachers by level or by subject, parents' associations, etc.) which is usually not the case in developing countries.

Thus, securing access to textbooks is still considered, from the point of view of general planning, as a side issue (by comparison, for example, with school mapping) and as

such is left to the initiative of the instructional directorates of the Ministry of Education (which may or may not have a specialized institution or structure) or to the initiative of the private sector.

3. The shortage of textbooks, the lack of control over access to them, and in many cases over-dependence on non-national sources, all justify the recognition of the need to take textbooks and instructional materials into account *at the highest level of planning*, i.e. how to secure that textbooks are called in question again at the first budgetary constraint.

It is not a question of determining how to produce the best possible textbook and put it to use; that can easily be done by a publishing institute. The planner must come into the picture upstream in order to be able to propose a choice among several alternatives and make allowances for, and settle, conflicts and divergences; the interests of educators, technicians and sources of funding are a priori different; how is it possible to *arbitrate*, and to do so *what criteria* should be adopted?

How can a 'project' become a 'programme', so as to ensure generalization and sustainability? Too often, projects come into being, develop, and fade away without continuity being assured, because they are not integrated in the overall framework of general educational planning nor in an overall development strategy.

Such a recognition of access to textbooks at the central planning level assumes that the planner is familiar with the interrelations between problems and decisions in different areas. Each problem encountered has repercussions on others, and a decision taken at the end of the line may have important repercussions all the way up the line.

The planner must therefore be able to take all the factors involved into account in order to make a choice among the different possible options, arbitrate among divergent interests and conflicts, and ensure continuity by proposing an appropriate development strategy so as to make a project into a programme.

Consequently the planner's training must include systems analysis components placing emphasis on the interrelations and implications of access to textbooks.

In what follows we propose a *conceptual framework* for a general problem situation.

B. Conceptual framework for a general problem situation

1. Such a problem situation will necessarily take into account:

- *Demand:* the existing demand; enumeration and analysis of requirements; identification of payer's (at different levels and for different types of education and training).
- *Supply:* enumeration and analysis of different sources of supply and of distribution circuits (with an examination of their relevance to demand).
- *Access:* how to secure equal access to textbooks in both urban and remote rural areas.

- *Decision-making processes:* that is to say the analysis of the different channels of decision-making (pedagogic, administrative, technical, commercial, etc.) and their interactions.
- *Regulatory mechanisms* which can help to improve the quality of materials and to reduce costs so as to obtain the best value for expenditure incurred.

2. Four major functions can be identified:

- *Design:* (priorities, decision, manuscript, layout, possibly preliminary trial use, etc.).
- *Production:* (production proper and/or any other form of supply).
- *Distribution:* (storage, routing, form of acquisition, etc.).
- *Utilization:* (handing over to and/or training of teachers, teaching guides, involvement of senior staff such as school principals and inspectors, quantitative evaluation, etc.).

3. Each of these major functions has implications in numerous areas:

- technical,
- economic and financial,
- teaching and learning,
- administrative.

They also have implications in planning and training (fields in which they may be described as transverse in relation to the four cited above).

4. Central planning is necessarily integrated, and textbooks must not be considered as isolated materials.

Firstly, the textbook is a component of a much larger category of materials: books in general. Specialists and experts unanimously agree that the publication of conventional school textbooks constitutes the indispensable substructure on which it is possible subsequently to progressively establish a *national book publishing policy*, a veritable component of the national identity. What are literates going to be able to read when they have advanced beyond the textbook stage, unless they have access to nationally-published books? (This aspect is often overlooked when setting up book production or publishing structures within the education system, which explains why some projects which are too confined or protected within that system have come to naught without making it possible to create a national publishing sector, which is often the only way of enabling young people to continue reading in their own language after they have left school).

Secondly, school textbooks, while being the most cost-effective medium in the short term by comparison with all other strategies designed to raise the standard of education, form part of a wider spectrum of instructional materials and media. The *cohesion* of these materials one with another (in direct relationship with the curriculum), and their *complementarity* (should textbooks or other kinds of instructional materials take precedence in science teaching?) are the best guarantees of the effective implementation of any *educational technology*.

5. Such a conceptual framework, which is summed up in the table below, is applicable at all levels:

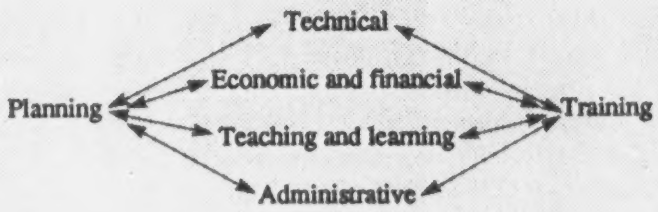
- literacy training,
- basic education,
- secondary education,
- technical education and occupational training,
- training of personnel,
- higher education.

The last three lend themselves particularly to regional and international co-operation.

Conceptual framework

	Four sub-systems	
The school textbook is an essential component book publishing industry	- design - production - distribution - utilization	The school textbook is one of the components (and the most cost-effective one) of instructional materials and media in general

Six areas



Taking these sub-systems and areas into account at different levels should enable us to arrive at the principles to be adopted for a sound rationalization of the processes and mechanisms and a better co-ordination of responsibilities among the different partners involved (and notably the apportionment of responsibilities between the public authorities

and the private sector) so as to take due account of the degree of centralization and manage human resources more efficiently. This last point is often neglected; the management of personnel assigned to specialized institutions makes no allowance for certain specific features. It is not a foregone conclusion that a person will remain a curriculum development specialist or a salaried textbook writer throughout his or her professional life, especially when such activities are combined with day-to-teaching work to an increasing extent. So it is often necessary for the development or survival of specialized institutions to distinguish between occasional and permanent functions, suitably adapt recruitment and posting arrangements, and provide training for reconversion so as to improve career prospects.

6. The planner must be particularly aware of the importance of the analysis of the interactions between sub-systems and areas, in order to be able to propose any necessary arbitration. To take a very simple example: should the use of textbooks be allowed at home, outside school hours? This is a pedagogic problem which is not without technical repercussions (the covers and binding must be stronger) and which has its financial aspects (a stronger book with a shorter life is necessarily more expensive).

C. Expected results of the seminar. Follow-up of the Jomtien conference: International co-operation and the role of the IIEP

1. The Seminar, fits naturally into the follow-up of the Jomtien Conference, should lead to the identification of measures best able to improve access to all types of school textbooks, both qualitatively and quantitatively, having regard to economic constraints.

This guidance note has placed special emphasis on the importance of taking textbooks into account at the central planning level. In this connection, it is important to give thought to what has to be done and what research needs to be undertaken. Thus the Symposium, bringing together planners, administrators, experts and professionals, will be able to define as precisely as possible:

- What has to be done with regard to the necessary information and training.
- The relationships to be established between this new field and other sectors of educational planning and administration.

Furthermore, the Symposium should be able to define new areas of international co-operation, particularly concerning:

- Administration and management, for the rationalization of structures and mechanisms and for the optimization of both human and material resources.
- Training, for an approach to professional profiles and to specific training requirements.

2. The identification of priority lines of approach, shortfalls, and urgent problems calling for research, analysis and documentation, and of training targets, content and personnel, could -- where the IIEP and/or similar institutions are concerned -- lead to recommendations for making available information such as:

- Significant case studies and/or monographs relating to specialized fields (technical education, the management of funds acquired, joint publication procedures, distance education, etc.).
- The typology of administrative and planning structures.
- An inventory of forms of co-operation.
- The limits of transferability of publishing technology for certain types of textbooks.
- The possible forms of utilization of computer-assisted publication.
- Training curricula.

This would make it possible to disseminate relevant information in the form of one or two technical guides (administration, planning) and to provide, on request, training matched to requirements at either the national or the sub-regional level.

Macro-planning of school textbooks and teaching materials

by Aimé Damiba

This contribution emanates from the UNESCO Regional Office in Dakar, which explains why it is somewhat Africa-centred. But this is not by chance; it can be accounted for by the fact that Africa, whose book market is very largely foreign-dominated, offers a suitable line of approach to the problem of the development of school textbooks and teaching materials. For Africa is in the process of adapting itself to the written word, science and technology -- but in a singular way, because the process still involves the use of foreign materials and languages, with the risk of creating a captive market. Here, even more so than elsewhere, politics, economics and culture are subtly and intimately interlinked.

In many developing countries, it can be said that textbooks account for the bulk of book production. For example, in the Côte d'Ivoire in 1983, 3,766,000 copies of books were produced, of which 3,517,000 were school textbooks, covering 13 titles. This is a country which since 1985-1986 has itself been producing all its primary school textbooks. In cases of total dependence on supplies from abroad, textbooks account for a considerable proportion of books imported. It is estimated that in 1982, for Africa as a whole, 70 per cent of imported books were textbooks intended for primary, secondary and higher education.

Very few statistics are available concerning teaching materials. We know that in Africa as a whole pupils lack books and basic school supplies, but the situation has not been systematically assessed. Most specific studies have been undertaken by foreign aid and funding organizations. A body of data has been gradually gathered, enabling ratios to be established. One book per four pupils in the main subject area (reading) is the norm in countries that are relatively well-endowed in this respect.

Where quality is concerned, imported teaching materials are generally of good physical quality and presentation. They have the advantages of attractiveness and durability, despite their frequently high cost.

With regard to locally-produced materials, the legitimate concern is to ensure that their content is more closely matched to the national context, and to make them available at lower cost. But in some cases the content is either too poor or too ambitious for the pupils for whom they are intended. Their physical quality may be so poor that they become unusable in a matter of months.

'Planning the quality of education' is seen to be more than just a new slogan. Substantial efforts must be made to expand education systems. Some countries have been able to provide almost universal schooling for their children, but within the four walls of a classroom devoid of any teaching materials, where they learn almost nothing. Which

justifies the interest taken in the subject of teaching materials, and textbooks in particular, which are to an increasing extent recognized as a determining factor in the learning process.

Such being the situation, from the point of view of developing countries the essential question at the level of macro-planning should be: 'How can we establish a textbook and teaching materials policy which effectively favours the learning process?'. To this end, design, production, distribution and utilization are four major aspects which should be successively examined.

I. The design of teaching materials

The 'Mamadou Bineta' phenomenon

'Mamadou and Bineta' is a well-known series of primary school textbooks in French-speaking former African colonies. Three titles are particularly representative: 'Mamadou and Bineta learn to read and write'; 'Mamadou and Bineta can read and write fluently'; and 'Mamadou and Bineta have grown up'. After falling into oblivion following these countries' accession to independence, the series was re-published and circulated, and a new title was added: 'Mamadou and Bineta have become independent'. What happened? The phenomenon partly reflects a weakness in the capacity to design school textbooks in the client countries.

Despite the widespread trend towards curricular reform in African countries after they became independent, a national textbook production capacity did not emerge in all the States concerned. Numerous countries South of the Sahara are still completely dependent on imports from abroad where primary school textbooks are concerned.

One reason is that governments have not in all cases realized the importance of textbooks and teaching materials as a factor in scholastic achievement in general and in the success of educational reforms in particular. The general objectives of educational reforms have often taken the form of structural reorganization and quantitative growth. Transformations of educational content have not been systematically planned, and the education policy has not made provision for adequate resources to be allotted to this sector. It may even be said that for a long time there was a misapprehension as to the real process of book production, which was regarded merely in terms of printing. It was not until curriculum development centres came into being that there emerged an awareness of the need for textbooks and teaching materials to be designed locally. International organizations like UNESCO, Unicef, the World Bank and Development Banks gave substantial encouragement in this connection.

An economic and cultural necessity

The objectives of a national policy for the promotion of books and textbooks must include, and give priority to, the establishment or strengthening of a national design capacity. This is a necessity not only because it is the first step towards a real control of the publishing industry, but also and especially because for developing countries it is one way of ensuring that contents are suitably matched to requirements. This is a very explicit necessity in countries which have introduced reforms of educational content involving, for example, national languages as media of instruction or as subjects taught.

Textbooks represent a market, a sector of economic and commercial activity to whose advantages those responsible for economic policy should not be indifferent. These advantages cannot be enjoyed without circumscribing the field of design. To concretize this intermediate objective, the decision must be made to create -- if it does not already exist -- a structure incorporating the different tasks involved in textbook design. These tasks include the study of curricula, decisions as to what textbooks to produce and/or import, the selection of writers, the preparation of manuscripts for publication, the production and testing of mock-ups, and contacts with printers -- not forgetting the quest for sources of financing. It takes time, as well as qualified personnel in a variety of specialized fields, for these tasks to be performed in a continuous, integrated and efficient manner.

Interim strategies

At the strategic level, pending the creation of a national textbook design capacity, recourse can be had to interim solutions such as translations, adaptations and joint publishing operations. When the initiative for these solutions is of national origin, it is a way of gradually building up a national textbook design capacity. Furthermore, such solutions are economical by comparison with the production of new textbooks. Four constraints have to be taken into account in deciding to produce a new textbook: the availability of competent authors and graphic design specialists, the time available, the size of the market, and the financial bracket.

But interim solutions must be precisely that, and not fools' bargains. This raises the whole problem of dealing with publishers in developed countries. In some circumstances, a real transfer is long in materialising, and increases the risk of greater dependence.

Operational ways and means

After the institutional framework for the design of textbooks has been set up, the most determining ways and means of operation, are research, training, and co-operation between countries.

Research covers in particular curricula, the object being to ensure that they are relevant and at the same time allow textbooks to be used for long enough to justify the capital outlay involved.

The training of textbook writers and of various publishing specialists is a priority.

Co-operation between countries in a given region can help to strengthen publishing capacity and create a market for jointly produced books. But it has to be admitted that this trend is still little more than a pious hope; all that has been achieved in reality amounts to isolated and not very effective attempts at such co-operation, and North-South relationships.

II. The production of textbooks and teaching materials

The problem of competitiveness

It is through the production process that textbooks and teaching materials in general connect with the industrial sector. Failure to understand this and take account of it can lead to much frustration.

Most countries have printing works, or at least the State Press. In the absence of a tradition of textbook production these units cannot, by reason of their design and capacity, meet the demand for textbooks either qualitatively or quantitatively. In the past, Ministries of Education have been tempted to acquire large-sale printing works; in many cases this has resulted in setbacks due to lack of business management know-how.

But at the present time several African countries print their textbooks locally, using private, partially state-owned or wholly state-owned printing works capable of doing the job acceptably. But in all cases there are three series of specific constraints. Printing equipment is expensive to buy, maintain and replace; and after a time it becomes obsolete, costly to use, and inefficient. Secondly, imported equipment, apart from its high cost, is not always of the required quality in the light of the local context of its use. Thirdly, the technical competence of the personnel in certain specialized areas may not be adequate. As a consequence of all these factors, the finished products turned out by local printing works may find it difficult to compete, quality for quality, on the world market. Ironically, imported books are in some cases exempt from customs duties, whereas printing machinery and equipment is not. Lastly, under privileged bilateral arrangements some countries can receive substantial consignments of books as free gifts, thereby cutting import costs and at the same time making it unnecessary to produce those books nationally.

Objective: a book for every pupil in the year 2000

The facts, and the problems involved, seem to contradict the assumption that the local production of textbooks should be more economical than any other solution. In actual fact, this primary objective of a national production policy is in a number of cases attained in the context of international tender invitations as a result of which foreign companies easily come out winners. But there are other considerations which justify national efforts.

At the Summit Meeting of Heads of State of French-speaking countries it was advocated that all primary and secondary school pupils should possess textbooks covering the basic subjects by the year 2000, and that the publication of these textbooks by the countries of the South should be strongly encouraged. Such an objective cannot be attained unless national capacities in the field of the graphic arts are stepped up.

A country such as Nigeria had good reasons for deciding, under the 1981-1985 National Development Plan, that all primary and secondary school textbooks and 50 per cent of books for use in higher education should be printed locally.

National strategy and regional co-operation

The attainment of the objectives of local product of textbooks at low cost is a matter of national or regional strategy in the medium and long term. At the national level, a difficulty for some countries lies in the size of the market when only a small target group has to be reached; this applies to publications in national languages in multi-lingual countries. When it has been possible to select a certain number of languages among many for uses as languages of instruction, the problem that arises from the point of view of textbook production is that the market is limited and the cost of production will be so high as to be economically unprofitable. A solution, albeit a partial one, would be to envisage publications, intended for countries sharing the same languages. Such a regional programme of publication in African languages was launched by the Regional Office in Dakar in 1986, since when it has produced five publications: in Bambara (Mali), Ewe (Togo), Kiswahili (Tanzania), Pulaar (Mauritania) and Rouga (Mozambique). Another way of achieving economies of scale exists for books, much of the contents of which can be standard or can consist of illustrations (children's books, art books, technical books, etc.). In such cases co-operation between printing works would enable costs to be shared.

Generally speaking, regional co-operation is in principle considered to be able to play an important role in reducing the cost of teaching materials and textbooks. But examples of such co-operation in this field are few, and those which exist have been short-lived, like the Regional Centre in Cameroon for four African countries (the Cameroon, Gabon, Chad, Central-African Republic) which operated from 1964 to 1970. A similar centre was formed in Sierra Leone in 1970, covering Sierra Leone, Liberia and Guinea in the framework of the River Mano Union. The Member States of CONFEMEN are working to establish inter-State co-operation based on the Teaching Materials Production and Training Centre in Bouaké.

Resources

To make profitable use of the considerable resources required by the setting up of pedagogic industries, efforts must be made in the fields of research and training. Research will have to be undertaken so as to lower production costs; for example:

- On the possibilities of producing books to be shared by several countries;
- on the possibilities of new technologies where the production of textbooks is concerned;
- on how costs can be cut (weight of paper, format of books, number of pages, use of colours, binding and finishing).

Training must cover all the specialized fields of book production and publishing. Ways must be found to reduce training costs, and this is possible at the regional and sub-regional levels.

III. Distribution

The weakness of the communication and transport system

In Africa, the beginning of every school year sees the advent of an ever-growing number of pavement vendors of stationery and books in towns and cities. They sell both new and second-hand items, and sometimes the customer, after haggling, pays a higher price than he would have in an ordinary shop. Like all other essential goods, the distribution of textbooks and teaching materials has its formal circuit and its informal circuit; unfortunately, the circuit does not extend to the remote villages.

There is a wide variety of systems, ranging from a completely free market through a mixed-economy society to a State monopoly. The results vary depending on constraints connected with the shortcoming of communication and transport systems. At first sight, distribution seems to be primarily a question of management, infrastructure and logistics. But before considering these technical aspects, there are options stemming from planning.

Policy options: free textbooks: the role of the State

The first question is to decide whether textbooks and teaching materials shall be free of charge or not. On the principle of compulsory free schooling, some countries have adopted a policy of free supplies, mainly at the primary level but without excluding other levels. Along the same line of reasoning, where textbooks are concerned for example, it must be decided in what proportion they will be distributed. When the ratio is one book per two pupils, those who can acquire a textbook of their own constitute a potential market. Their list of supplies is limited to a minimum, which means that some materials have to be purchased. A number of related measures are intended to provide teaching materials free of charge within the limits of a given budget, which is not always extensible.

The consequence of adopting policy of free materials is the need to establish a distribution system which can cover all schools throughout the country. Otherwise such a policy is meaningless.

Faced with exorbitant cost of a free system, many countries levy a flat contribution from each pupil. This creates a find for the renewal of stocks, thereby proportionately lightening the financial burden on the State. In this case the distribution system operates parallel with a mechanism for collecting these contributions. Another aspect of general policy is the definition of the precise role of the State in the distribution system. In the context of structural adjustment, the principle upheld is 'less State control for better State Control'. The quest for maximum cost-effectiveness assumes that the free play of competition is the best solution. Broadly speaking, providing textbooks free of charge tends to assign an important role to the State, whereas if a charge is made the State is involved to a lesser extent.

Participation as a component of a distribution strategy

Where the distribution of teaching materials is concerned, it is worth giving thought to the question of how the beneficiaries themselves can be brought into the picture.

Participation is a key principle of any approach to development. In the field with which we are dealing here, the organization of participation can lead to a satisfactory definition of the beneficiaries' share in the cost of books, for example, without prejudicing the poorest children's access to education. To facilitate distribution in the strict sense of the term, the participation of communities and pupils' parents can provide solutions in cases where roads are not passable to motor vehicles; why not transport the books by bullock-cart or bicycle? This would constitute the vanguard of a complete distribution system comprising a network of warehouses, a transportation system, and a management system.

The sensitive points of a distribution mechanism

The distribution of textbooks in particular, be they imported or locally produced, is subject to two constraints: storage and delivery dates.

Storage warehouses are necessary: main warehouses close to points of production or points of entry, and secondary warehouses in different regions. The greater the distance from the capital, the less easy it is to find warehouses in good condition with suitable facilities for storing books. To minimize risks, the books must be kept in store for the shortest time possible. In the case of imported books, delivery may be demanded at the nearest point from which they will be distributed to users. But where locally produced books are concerned, the problem remains unsolved; the production system operates at its own rate and to its own schedule, and books may remain in store for ten months before distributed to schools.

The date of commencement of the school year is a decisive factor in the distribution system, and all the stages of planning depend on it: the planning of production in the case of locally produced books, the planning of orders in the case of imported books, and the planning of distribution in both cases.

Transport logistics depend on specific circumstances. Recourse must be had to small national potential resources at lowest cost.

The co-ordination of the whole operation depends on the system of management adopted. The main management tasks involve the prediction of requirements, relations with suppliers (importers and producers), stock management, the organizing of routing to users, and financial management and accounting.

Priorities for research and training

Research should be concerned with improving the efficiency of the distribution system in terms of geographical coverage, minimum cost, and conformity to deadlines, all in a carefully-planned context of user participation.

The training to be developed is primarily that of management personnel working to close margins in terms of time (ability to forecast) and in terms of budget (ability to maintain financial balance). And school textbooks are cultural products, so that those who distribute them must be more than mere administrators or merchandisers.

IV. The use of teaching materials

Under-use and over-use

When teaching materials are plentiful, they are generally under-used. When they are in short supply, they are over-used, and often not properly maintained in the case of scientific apparatus and technical equipment. Confining our remarks to textbooks, and assuming as is commonly the case that the same book is shared by several pupils, we may note two kinds of problems.

The first is of an educational nature: the non-use or under-use of teaching materials and textbooks. In the absence of teaching guides, or if they have not been properly taught how to use them, teachers do not make the fullest use of the textbooks at their disposal, and this naturally has repercussions on their pupils. This applies particularly to mathematics, and the advantage of the availability of textbooks on this subject is not always sufficiently highlighted. Textbooks, the content of which is ill-adapted, are not used, and rightly so.

The second kind of problem is of a more material nature; it relates to the physical handling of textbooks. They are not protected against early deterioration resulting from being handled by several pupils.

The situation is worse in the case of books that have been too cheaply produced and bound. When books are used collectively, they must be left in school overnight and at weekends, holidays, etc. But in some circumstances the school premises are so vulnerable that it is difficult, if not impossible, to prevent theft. Alternative solutions are adopted ad hoc. Due regard for the length of life of textbooks after they have reached their final destination enables pedagogic and economic objectives to be wisely reconciled with the policy of utilization of teaching materials.

Objectives of use

The objectives of the use of textbooks are twofold. First, to improve the learning process by increasing the effective use of textbooks by pupils and teachers; second, to increase the length of life of textbooks by making provision for their preventive maintenance and repair. These objectives apply to all types of the teaching materials.

Strategy of use

The strategy by which these objectives are attained is implemented by school inspectors, teachers, and pupils themselves. As part of their task of educational counselling and leadership, inspectors help teachers to derive maximum benefit from their teaching guides for the preparation of their lessons and the instruction of their pupils. This is of prime importance in the case of the use of new textbooks corresponding to new curricula. The school principal can also play an important role in this field. With regard to the preservation and repair of books, teachers must set the example; they have been familiarized with the simple techniques of book maintenance and repair, and pass on their knowledge to their pupils, in whom they inculcate the habit of keeping books in good condition.

It goes without saying that parents who can read and write and who seek the teacher's advice can play a very important role in their children's use of textbooks.

Implementing a policy of utilization

We have not yet reached the point where textbooks are thrown away after use, but it is as though we had, in the absence of a policy of maintenance involving the requisite materials for maintenance and repair, as well as training, the creation of awareness of the importance of these matters, and research in this field.

A comprehensive textbook policy can make provision for the supply or acquisition of materials necessary for book maintenance and repair; but above all, the problem of the security of books in schools must be solved.

Where training is concerned, seminars can be organized for teachers to heighten their awareness of this problem. Book-binding used at one time to be a highly-regarded practical activity in schools.

It is normal for surveys to be systematically conducted on the two aspects of the use of textbooks: their teaching/learning impact and their relevance to the development of knowledge and teaching on the one hand, and their length of life on the other hand.

Conclusion

To conclude at the point where we began, discussion may be directly triggered by a concrete and by no means singular example.

In Senegal, the urge to bring about educational reform manifested itself in a consensus in 1981 among all education and training partners who set an example in the sub-region. The generalization of education and the introduction into the curricula of national languages, productive work and religious instruction were among the major objectives of the 'new school'. Since 1983, a policy of making textbooks and school supplies available free of charge has been adopted and progressively applied to cover all regions of the country. The first books, designed locally in conformity with the spirit of the reform but produced abroad, are expected at the beginning of the school year 1990-1991. It has taken nearly ten years for the reform to begin to produce results in terms of new textbooks. Such a long period justifies the claim that planning should take textbooks and teaching materials into account. But what contribution can planning make to this sector?

The political, economic and cultural imperatives of educational development require every country to adapt itself to the stages of design, production, distribution and utilization of teaching materials, and to make these tasks as endogenous as possible. The strategy adopted tackles them in reverse order, putting distribution and utilization before design and production. The two latter fields lend themselves to an approach involving co-operation between countries in a regional or sub-regional context, allowing of economies of scale.

Research and training are just as necessary to this end as financing and the provision of facilities and infrastructures.

Where the design of textbooks is concerned, priority should be given to research on curricula and the training of book publishing personnel, beginning with writers. Production requires priority to be given to seeking ways of reducing costs and training specialists in the graphic arts. Priority in distribution should be given to surveys and to training in forward-looking management. To derive maximum benefit from the use of teaching materials, evaluation studies and teacher training should take priority.

The development of school textbooks and teaching materials is a highly specialized field; it can be likened to a rather exclusive club. The IIEP proposes to help to gain access to it, and in so doing to bring into educational planning the abundant content of an extremely demanding field.

Key issues in the management of textbook development

by Anthony Read

The successful delivery of textbooks and other learning materials to a targeted educational group is never a wholly educational issue. In western developed countries the existence of a sophisticated raw materials, manufacturing, distribution and skills base minimises the complexity of the processes and inputs involved, and enables the textbook to be conceived and developed from a largely educational viewpoint. In almost all developing countries the infrastructural support for textbooks is often hardly in place, and in some countries it does not exist at all. In the past twenty years since textbook development has become an increasingly large issue, country after country has failed to appreciate the importance of the right kinds of support and infrastructure.

Books are dominantly manufactured from paper, which is a raw material produced by a heavy industrial process often requiring very large sums of investment and its own skills learning curve to become reliable in quality and cost effective in production. Decisions on investment in paper are usually taken by ministries of industry and it is rare that the views of the educational establishment are sought. Even when they are, Ministries of education are rarely sufficiently informed on the detailed technicalities to provide adequate guidance.

It is not uncommon to see local newsprint production plants protected by tariffs that prevent the importation of paper of the right quality for the required textbook specification. All too often local textbook publishers are forced to purchase unsuitable local paper at prices substantially above those operating in the world markets, simply to subsidise an uneconomic local plant which is exporting its output to neighbouring countries at a loss, to earn foreign exchange. In this circumstance, the Ministry of Education and the children of the country are directly subsidising both the Ministry of Industry and perhaps the Ministry of Agriculture as well, who may also have invested heavily in the development of plantation crops to provide the raw materials to go into the paper plant.

Similarly, printing is also an industrial enterprise which is subject to the policy dictates of the Ministry of Industry rather than the Ministry of Education. To most laymen one printing machine is much like another. The special skills of the book printer are ignored, and book production is often left as a seasonal filler in the work schedule of the jobbing commercial printer. The machines themselves may be unmatched with paper sheet sizes and both may be unmatched with the designed format size of the book. It is not uncommon to find paper wastage rates of 50 per cent or more resulting directly from a mismatch between machine size, sheet size and format size.

The above examples are only an illustration of the myriad of pitfalls which lie in the path of successful textbook development. The early history of aid-funded textbook projects is largely the history of a single factor approach to project design. Early projects were

curriculum projects, *or* publishing projects *or* printing projects *or* distribution projects. It is comparatively rare for an aid funded or government sponsored approach to textbook development to give equal weight to all issues and, more importantly, to involve all other parts of government and industry in the planning and decision making process.

Aid agencies and governments do not understand the issues involved, and cannot be blamed for failing to see the complex interconnections on which success or failure so often depend. Much of the professional advice available to them is understandably biased. A curriculum developer will inevitably want investment in curriculum development; a printer will inevitably require investment in printing.

In 1987 a World Bank staff officer, Barbara Searle, produced the 'World Bank Operational Review of Textbook Projects'. This survey of past project experience highlighted the lack of sectoral analysis, the lack of comprehensive planning and the failure to identify key issues and problems as the major contributory factors in a wide range of textbook projects failing to achieve their objectives. As a result of this paper, the concept of the *Book Sector Study* was developed. Since 1988 five Book Sector Studies have been undertaken as the basis for book project planning in Angola, Côte d'Ivoire, Nigeria, Tanzania and Zambia. Further studies are either under way or planned in Kenya and Namibia. The restructuring of Eastern European book trades is now starting with Book Sector Studies in Czechoslovakia, Hungary and Poland, and there have also been requests from governments for Book Sector Studies in Kampuchea, Laos, Vietnam and Zimbabwe.

The concept of the Book Sector Study is very simple. It suggests that the whole range of issues and activities involved in book production should be the subject of pre-project sectoral study in exactly the same way as an education sector analysis is now widely seen as a necessary foundation on which to build an educational policy. In fact, Book Sector analysis is now more usually located as a sub-sector of educational sector work.

In a Book Sector analysis the existing book provision system is examined at every level of the educational system from kindergarten, through to tertiary, and also covering, where appropriate, technical and vocational education, adult literacy, army education etc. The book requirement is perceived as both textbook material, other media material, supplementary reading materials and library provision and even consumable stationery supplies such as exercise books, pens, pencils etc. Local authorship capacity, publishing capacity, pre-press, printing, binding, distribution and management capacity are examined and assessed. The availability, cost and quality of raw materials is analysed. The existing balance between imported and locally produced materials is included and detailed studies of local copyright legislation, contractual practice, import regulations, protectionist policies, foreign exchange availability are all undertaken. There is also coverage of government policy and policy parameters toward book provision and education, and in particular government policy attitudes toward the financing of book supplies.

A sectoral analysis of this sort requires the application of a wide variety of skills and the composition of the research team will vary according to the conditions operating within any country. Typically, however, it consists of a publishing specialist, a librarian, a print/production expert, a distribution expert, a finance/management specialist, and occasionally copyritght and contracts expertise. The team leadership is generally external to

the country since this minimises understandable bias and maximises objectivity. With this caveat it is always desirable to have a mixed local and external team working together.

The ideal outcome of a Book Sector Analysis is a series of detailed, factual reports on each aspect of the book sector which can act as a reference point in debate and a useful resource in project planning and implementation. This mass of data should be summarized in a short review which highlights the key issues, identifies problem areas, suggests wherever possible a range of alternative options and provides outline conclusions and recommendations. The summary report should be written from the point of view of a busy Minister and busy senior Civil Servants. It should be written in the language of the layman, and should clearly explain key issues as well as setting them out in a form which is easily digestible. Even reports of this nature can be left on a shelf and forgotten, and desirably a Book Sector report should also be the subject of a local conference in which the report is presented to government, interested aid agencies (so that a co-ordinated general activity can be achieved) and to all working professionals in the area. The objective of such a conference will always be to produce a long-term comprehensive book policy, widely accepted by all those involved in it and affected by it.

Striking results can often be achieved. In country X a consistent chronic lack of textbooks in schools led a variety of different aid agencies to try solution after solution -- rather like a garage constantly fitting a new spare part in the hope that something would make the car run. The local printing industry was completely re-equipped and re-trained. Free paper was provided in large quantities. Technical assistance and training was provided to the local publishing industry. New book warehouses were built across the country. The distribution parastatal was provided with a new fleet of vehicles. At the end of this investment there were plenty of books, but they were all stuck in warehouses and weren't in the classrooms. The sector analysis revealed that the major cause of book shortage was caused by the financing mechanism. District Councils were provided with government funds to purchase books to give away to pupils. The District Councils were short of money, and spent their book capitation allowances on more pressing problems such as salaries and medical supplies. Because the District Councils were not buying from the distribution parastatal these in turn could not pay the publishers for the books delivered. The publishers in turn could not pay the printers, the printers could not pay the paper manufacturers, and the paper manufacturers couldn't pay for their supplies of raw material. The solution was simply to remove book capitation from the District Councils and to maintain it at Headquarters where supplies could be paid for directly.

All that has been mentioned above can be summarized by two simple statements:

1. Textbook development is a complex process which involves the commercial, industrial, financial and even agricultural sector as well as the educational sector.

2. Textbook development activity will always be inhibited and will often be a total failure unless comprehensive cross-sectoral analysis and research is undertaken as an essential preliminary to action.

Out of twenty years of Book Sector experience a number of key issues have emerged which crop up again and again. These are:

(i). *Time scale*. The establishment of adequate and sustainable book provision can rarely be achieved within the lifetime of one project. The three- or five-year approach has never been successful. The 'inertia' factor requires that all development activity should be conceived over at least ten years, and ideally fifteen years.

(ii) *Financing*. There are a number of well-established options, but in the end the financing problem can be summed up as the need to achieve affordable provision which is also sustainable in at least the medium term. *Parent purchase* systems of book provision remove the immediate financing burden from government but too often this also means lack of equity. Commercial supply for parent purchase inevitably concentrates on the richer, urban, easily distributable areas of the country and often ignores the poorer, rural, difficult access areas. Parent purchase from government sources is a way round the problem of equity, but also requires substantial organization and management input as well as adequate measures of financial control *Free distribution* from government to schools guarantees affordability by the pupil, but in fragile economic conditions is often an enormous burden to government.

Throughout the developing world in the last twenty years there is a common thread of falling government budgets on materials and equipment as governments struggle to maintain salary budgets. There is a truism in the book trade that 'people vote -- books don't'. An intermediate strategy is a *loan scheme*. Books are provided to schools for either free loan or hire against an annual textbook fee. This strategy requires investment in school storage and assumes a physical production specification which is good enough to achieve a longer book life and thus the amortization of production costs over a reasonable period of time. All too often the production specification does not match up to the environmental condition of the schools, and books in loan schemes disintegrate long before their specified lifetime. In some cases books which are required to last for three years have a classroom life which can be measured in weeks. Under these circumstances effective learning disappears as books become scarcer and scarcer in the classroom until the next point of supply. All of these alternatives can be *subsidized* to some extent or other by government. Other stratagems used in recent years include the establishment of a revolving fund in which proceeds from book sales or loan schemes are invested in a trust fund which can only be used for re-purchase of textbooks. Revolving funds have a mixed history, the commonest problem being the inability to maintain them intact in a Ministry of Education which is starved of funds in all areas.

The financing issue requires proper market research, careful planning, efficient and flexible management, adequate supervision and reporting back, proper evaluation and, most importantly, a long-term commitment by governments and funding agencies to establish a sustainable financial profile.

(iii) *Conceptualization and manuscript development*. This is a big issue and needs a full paper of its own, but there are some broad problems that can be noted. Much development activity in the past has been largely unrelated to the costs of provision. In the past twenty years we have seen throughout the world the growth of multi-subject approaches to primary education in particular. Tanzania for example has a twelve textbook requirement for Grade 6 primary, Turkey has a fourteen book requirement. Not only are these multiple subject requirements extremely difficult for untrained teachers to cope with, particularly in

situations where they lack adequate facilities and resources, but they are also extremely expensive to provide.

A recent content analysis of language and maths books in developing countries provided partial evidence of an extremely steep learning curve at the beginning of primary education, with quite high level skills and concepts introduced too quickly. There is also evidence of urban bias in much curriculum development and authorship.

(iv) *Publishing skills.* The level of publishing skills available for textbook development varies widely. In Nigeria, for example, there is a well-established locally based publishing industry with a strong track record of producing high level material for schools at primary and secondary level. In contrast the level of publishing skill available in Sierra Leone in the early 1980s when their textbook project started was absolutely zero, with no editorial, design, layout, production control or financial management base whatsoever. There is a major issue here as to how publishing skills can be acquired, and local publishing development encouraged. Many countries in the past twenty years have opted for state publishing units to take control of textbook production. These units have consistently thrown up issues of publishing staff development in a Civil Service environment where staff are posted in and out, institutional memory is limited and staff training is constantly negated. the relationship between state and private sector publishing and between local and multinational involvement are both consistent issues. The role of adaptation and/or translation in certain subject areas such as maths, science and technical education as opposed to local origination and the relevant merits of these approaches is also important.

(v) *Raw materials.* (see above)

(vi) *Manufacturing.* The key issues in manufacturing are cost, reliability, capacity and quality for the defined task in hand. Physical production specifications required by government policy often require investment in plant which cannot be sustained by the throughput. Thus the specifications for longlasting textbooks require at least burst binding, and desirably thread sewing of signatures. Adequate protection against damp and scuffing ideally require UV varnishing. Binding is a consistent bottleneck and problem area. Printing on high quality paper is often wasted because the binding style does not produce sufficient protection for the text block. High cost local manufacturing provides employment and uses local resources but is often at variance with higher quality, lower cost and greater variety of printing overseas. This is not necessarily a developed/developing country issue. In Nepal, for example, better prices, higher quality and greater reliability will almost certainly be achieved by using Indian printing sources rather than by developing investment in a specialized local plant.

(vii) *Distribution.* This is one of the most problematic and yet at the same time underplanned and under-financed areas anywhere. Many developing countries have extreme distribution difficulties caused by underdeveloped transportation networks and severe physical conditions. The costs and difficulty of transportation are high and are often extremely seasonal. Often the school year has been geared to developed country university terms, rather than to local climatic conditions. Much of West Africa, for example, consistently attempts to distribute books to schools in the middle of the rainy season for a September school year start. Basic locational analysis for warehousing is often neglected,

warehousing staff are untrained, inadequate storage in the classroom results in expensive book resources being misused and damaged.

(viii) *Supplementary materials*. Over the last twenty years a great deal of attention has been given to developing basic textbooks in the classroom. In many countries, particularly in rural areas, the textbook is frequently the only reading material seen by the child. In a recent survey in Nepal it was discovered that children in an inaccessible and rural school lived in homes which had never owned a book. They had no access to newspapers or journals whatsoever. There were no road signs or shop signs in their village. The only reading material the children had seen after eight years of schooling were the textbooks in the classroom. In this situation, literacy and numeracy can hardly be expected to develop beyond the most basic level and reading is perceived as an activity carried out only in the school classroom, which has no relevance to normal life. The failure of many educational systems to make any supplementary materials provision at primary school level or any basic library provision at secondary or even tertiary level deprives huge numbers of children of any opportunity to develop reading and research skills, reading for pleasure, enquiry-based learning, etc. Education is maintained, as a result, at the most basic level of rote acquisition of knowledge.

The key issues above represent brief notes only of highly complex problems and are meant to be indicative rather than exhaustive.

Despite the recurrence of similar problems again and again no two textbook development problems are similar. The problems occur in different combinations, within different economic, political and cultural frameworks. There is no general panacea or remedy which can be applied to any particular situation. The path ahead lies in detailed and professional sectoral research and analysis which recognizes the complexity of the process and integrates proposed solutions across the entire range of the Ministries, institutions, organizations and companies involved.

Curricula and school textbooks: toward indispensable synergy

by Christian Depover

First proposition: Textbooks must be designed in close coordination with the authorities responsible for setting out curricula.

All too often, for lack of resources and time, the design of school textbooks is left to individual initiative and to the self-sacrifice of teachers or inspectors, whose worthiness is unquestionable, but whose technical preparation is generally insufficient. This approach to the preparation of school textbooks, in imitation of what happens in many industrialized countries, turns out to be particularly disastrous in third world countries, where competition among textbooks is virtually non-existent. In industrialized countries with liberal economies, where this decentralized production of textbooks is very common, the supply of textbooks is such that producers enter into competition, to the advantage of teacher-users. In developing countries the situation is quite different, for the need is often so acute that one cannot allow oneself the luxury of financing the production of several textbooks in parallel.

In this context of limited resources, it is imperative to view the design of school textbooks as a rigorously planned and controlled process, through close coordination with the teams responsible for curriculum design.

Second proposition: The production of school textbooks must be taken into consideration in the overall planning of any school programme reform.

It is now known that the success of a school reform is strongly dependent on the quality of accompanying measures, such as training of the staff who will implement it, or ensuring availability of appropriate educational materials.

Thus it is of decisive importance to include the design, the production and the distribution of textbooks in the overall plan for revising the curriculum. Too many reforms have failed, because of not having seriously considered the textbook issue, for this type of error to be committed again.

Some countries, without necessarily having solved the school textbook problem definitively, have fully understood the importance of this parameter for the success of a reform, and have created one or several school printers that produce all the basic education textbooks, thereby taking the greatest possible advantage of economies of scale. By way of example, there is one country in North Africa with a single school printer producing close to one million textbooks.

Without wishing to argue that extreme centralization constitutes a solution to all problems of publishing for schools, we do recognize that this approach often leads to situations, that, while not ideal, at least make it possible to avoid the complete failure of programme reform for lack of educational materials.

Third proposition: The design and the presentation of textbooks should put the stress on flexibility and adaptability.

While not an inevitable corollary, the centralization of the production of educational material is often accompanied by a certain rigidity, that makes it difficult to adapt textbooks to the inevitable shifts in a programme reform.

In order to meet this flexibility requirement, decentralizing production over several small entities is certainly more appropriate, especially for the purpose of adapting to local and regional specificities.

With respect to this concern of flexibility and adaptability, the introduction of some modularity in the design of school textbooks should result in a broader scope of application of educational texts, by allowing for recourse to the same book as a support for different curricula.

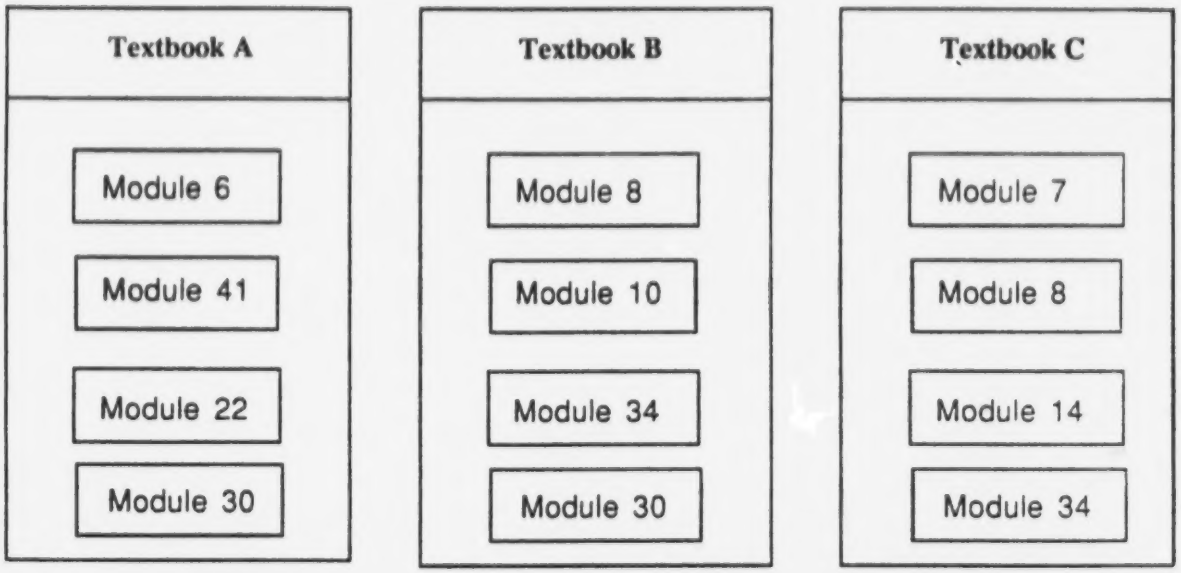
In concrete terms, such modularity involves the definition, for each of the textbooks, of a certain number of modules whose breakdown parallels that of the reference curriculum. In practice, this breakdown will often coincide, after some minor adjustments, with that of other curricula. For example, a module devoted to solving first-degree equations with one unknown, originally designed for a 'strong mathematics' curriculum, could also turn out to meet the requirements of other programmes of study, more oriented toward natural sciences or business, or even the requirements of curricula with more pronounced vocational orientations.

Linked with the definition of multi-functional modules, this flexibility is all the greater the more highly developed the modular structure. For each of the modules one should, as a minimum:

- specify its general objectives with reference to the curriculum;
- mention the prerequisites, together with a description of several exercises that can be used to verify that pupils have mastered them;
- provide an introduction to the module, in order to give pupils a clear sense of the relationship between what they already know and what they are about to learn;
- provide a summary stressing the way in which the different concepts studied in the module relate to one another;
- offer a sufficient number of exercises, chosen in such a way as to lead the pupil to mastery of the module's objectives.

Using modules meeting these minimal specifications, it is possible to put together textbooks suitable for different curricula from a particular collection of modules, as illustrated in the figure below. Such an approach makes it possible to use the same module for the preparation of different textbooks, as is the case in our example for textbooks A and B, which both contain module 30, and textbooks B and C, which both include modules 8 and 34.

Figure 1. Preparation of a textbook for assembling models



Fourth proposition: Providing teacher's guidebooks makes it possible to strengthen the indispensable convergence that must exist between school textbooks and curricula.

Apart from textbooks for pupils, the provision of documentation for teachers is often seen, in countries of the Third World, as an indispensable way of compensating for teaching staff preparation, considered to be insufficient. Even though this is not, in our opinion, a fully satisfactory solution to the problem of teacher preparation, the teacher's guidebook may nevertheless constitute a valuable way of reinforcing the necessary convergence between school textbooks and curricula.

Without wanting to enter into a detailed discussion of the design of documentation for teachers on this occasion, we would nevertheless like to stress the value of organizing them in a modular way, in parallel with the structure of textbooks. When designed according to this approach, a teacher's guidebook is divided into modules, each of which encompasses a limited number of class hours, and is built around a certain number of specific objectives that constitute part of the reference curriculum.

In order fully to play its role of interface between the textbook and the curriculum, the teacher's guidebook should not be limited to general references to the textbook, but rather the two should be closely interwoven, with a clear indication of the links that exist

between the general objectives set out in the textbook and the specific objectives described in the curriculum.

Fifth proposition: Recent developments in computer-assisted publishing provide interesting alternatives to the conventional techniques of school textbook production.

The current development of desk-top publishing tools holds out hope for a better potential of adaptation to change. At a cost compatible with the resources of a regional centre, or even an educational establishment, computer-assisted publishing actually offers possibilities that are perhaps not equivalent, but at least very close to those offered by conventional printing systems.

The desk-top publishing systems currently on the market, which include a micro-computer, a laser printer and one or several appropriate software packages, provide the textbook designer with resources that were available for a long time only to printing professionals. Without trying to be exhaustive, we mention access to a large number of different characters, wide-ranging page format possibilities (proportional spacing, justification, underlining and various visual highlighting techniques), flexible integration of graphics and drawings, and a resolution that, while not yet comparable to printing standards (1000 dots per inch), is getting better and better (on the order of 300 dots per inch).

Given all these possibilities, it is very probable that, in the near future, a non-negligible proportion of school textbooks will be produced through computer-assisted publishing. Some publishing houses have already understood the advantages of this approach, in particular to minimize the time period separating completion of the author's manuscript and appearance on the book-shop shelf.

In developing countries, the possible advantages of computer-assisted publishing systems seem to us to go well beyond moving certain deadlines forward. Provided it is used effectively by qualified staff, computer-assisted publishing should provide education officials with a new tool, useful not only for minimizing costs, but also, through shorter print runs, for ensuring better matching of textbooks to teacher needs and curriculum requirements.

Stimulating awareness

Far from pretending to propose a solution to the tricky problem of the relationship between school textbooks and curriculum requirements, the five propositions that we have formulated are essentially aimed at drawing the attention of individuals involved in school reform to the great importance of including, in any general approach to educational reform, detailed reflection on the ways of designing, producing and distributing textbooks.

Once awareness of this point has been ensured, we think that there presently exist technical and educational approaches (a few are proposed above) that make it possible, if not to solve all problems connected with the relevance of school textbooks, then at least to minimize the all too often negative impact that textbooks have on the long-term success of curriculum reform.

Copyright and the national production of educational materials

by Abderrahmane Amri

1. Prerogatives accruing from copyright

Copyright includes attributes of an intellectual and moral character, as well as attributes that are patrimonial in nature.

(a) The author's moral rights

The author's intellectual and moral attributes are as follows:

(i) the right of disclosure, meaning that the author alone decides when his work is ready to be communicated to the public;

(ii) the right to respect for his name, and to insist that it appear on all published copies, even when published in the form of extracts;

(iii) the right to oppose any modification or mutilation of his work.

(b) The author's patrimonial rights

The attributes of a pecuniary nature granted to the author consist in an exclusive right to authorize any form of utilization of his work. These forms especially include the rights of reproduction and translation, but also encompass the rights of adaptation, public representation and public performance.

The interest displayed by the entire international community in copyright is fully justified by the purpose and the very function of this field.

2. What is the point of copyright?

Is copyright really important for the intellectual life of humanity? This question has long preoccupied the minds of many leaders in developing countries, whatever their level of authority and type of qualifications. Whether they be men of culture, of education, economists, politicians, or, all the more so, consumers of works of the mind, they the argument of the pointlessness of protecting works of the mind, which should, by their very nature, circulate freely across the ages, across civilizations and across economic frontiers.

It is true that, since acceding to independence, developing countries have been constantly battling the difficulties inherent in achieving economic take-off, difficulties all the more severe given the limitations of these countries' resources.

Looked at from this point of view, copyright does in fact represent a conflict, for these countries, between culture and economics. But this conflict is not unresolvable, and the national legislation of each country can bring about a balanced situation, as long as the country considers itself to be developing.

3. The interdependence between copyright and education

The world of education has been experiencing profound transformations for several years. These transformations are due to many different factors. On the hand, the democratization of education requires that the transmission of knowledge be organized on a broader base than previously. On the other hand, the present pedagogical approach, which supplements traditional methods of knowledge transmission (orally by the teacher or through school textbooks) with active methods, whereby the pupil or student participates himself in the learning process with the help of specially prepared educational materials, is no longer possible without rapid access to available information and without the ability to copy information.

The recent explosion in communications technology has engendered profound transformations in the area of education, which now has recourse to ordinary audio-visual materials, to film, radio and television (for example, distance learning), to recordings (for example, language laboratories), and even to computers (for example, computer-assisted teaching) and satellites.

All in all, teaching institutions are presently much more affected than previously by the problems of access to and circulation of information.

4. The limitations to copyright protection

Apart from works that are in the public domain because the protection period has expired (under certain systems of legislation, the use of such works is subject to payment of royalties, generally used to build up a social or cultural fund benefiting national authors), some limitations or restrictions are also imposed on copyright protection by the legislation of the country where the work is utilized. These exceptions apply to both national and foreign works. This means that certain uses of a protected work are authorized without the author's consent. In such cases, some remuneration is sometimes but not always required.

5. "Fair use" and "Fair dealing"

These are special exceptions to the principle whereby nobody may reproduce, communicate to the public or otherwise utilize a work of which he is not the author. These exceptions to exclusive authors' rights are justified not by the content of the work, but by the objectives of the individual utilizing the work without the author's consent. One finds these copyright limitations in legislative systems following the Anglo-Saxon tradition. These same exceptions are more or less accepted under the so-called *fair use* or *fair dealing* concept. The concept is impossible to define precisely, but it has been developed and adopted by the courts. They especially take into consideration the size of the utilized part as a proportion of the entire work, whether or not the utilization is intended to make a profit, the character of the protected work, and the effect of the utilization on the work's potential market or

commercial value. In 1976 this concept was finally introduced into the copyright legislation of the United States of America.

6. The preferential regime in favour of developing countries

The regime of impairment of the usual law, added in 1971 to the texts of the international copyright conventions (Bern Convention administered by the World Intellectual Property Organization (WIPO) and Universal Convention on Copyright administered by UNESCO), in favour of developing countries that so desire, and provided certain rules of procedure are followed, consists of a system of obligatory translation and reproduction licences that are non-exclusive, non-transferable and payable; they pertain to school, university or school material research utilization.

7. Reproduction licences

A reproduction licence system was instituted, on the model of the translation licence, to benefit developing countries. Granted only under certain conditions, this licence is non-exclusive, non-transferable, payable and limited to the needs of school and university teaching.

Licences granted under this regime are in principle limited to printed editions of literary, scientific or artistic works. However, a licence may also be obtained for an audio-visual work designed and produced for the exclusive purpose of meeting the needs of school or university teaching.

8. Copyright and the teaching milieu

By virtue of its very function, the teaching milieu is just as much a disseminator of existing knowledge as a creator of new knowledge. As a result, this milieu produces a non-negligible proportion of the works likely to be subject to copyright. At the same time, it is clear that in many cases, and especially when producing educational material, professors could not complete their work without the material support given to them by the institutions within which they work. In this case it is very relevant to ask who should benefit from the royalties paid for utilization of copyright-protected works. Should it be the professor or should it be the institution with which he is bound through an employment contract. This question did not really arise as long as works were expressed in writing, since the educational institution's material support was not perceived as the determining factor in the creation. Things are different for non-literary works, when the technological input by the institution becomes so significant that completion of the work would be impossible otherwise.

There are three conceptual approaches to the issue of ownership of a work.

The first practice, common in countries with a Latin legal tradition, is favourable to the rights of the professor or researcher, in the sense that the copyright originally belongs to him, unless stipulated otherwise in writing in the employment contract, in which case any royalties normally paid to the author are transferred to the employer.

The second theory, prevailing mainly in countries with an Anglo-Saxon legal approach, has it that the author's copyright for a work originally belongs, unless stipulated otherwise in writing, to the employer or the principal. The conditions under which this presumption of transfer of rights is valid, given its exceptional character, are generally well defined by the legislation of the countries following this practice. For instance, the work must have been created specifically for the employer or the principal, which excludes from the transfer presumption other works that the same author may have created for himself, but provided, and this to be assessed by the courts in the event of a challenge, the author did not take advantage of technical installations made available to him by the employer.

The third approach, adopted by another category of countries, excludes any prior presumption of transfer, and requires that relations between teachers or researchers and educational institutions be spelled out, before the work is produced, in the employment or order contract.

The current trend of jurisprudence in many European and even some African countries, regarding the ownership of rights to a work created in the context of an employment contract, is leaning toward recognition of the rights of teaching staff over works they create in the context of their employment, provided, on the one hand, that the work is created on the teacher's own initiative, and that, on the other hand, the institution's material support is limited to means that are generally accessible to the author in question. As a corollary to this licence, the owner of copyright to the work must not oppose its dissemination or utilization within the institution with which he is connected. However, and to the extent that an educational institution makes available to a member of its teaching staff resources over and above those that are normally available to all, it has the right to recover the costs of such resources in the form of indemnification, but rarely by virtue of copyright as such. In the event of a challenge, all this remains subject to the judgement of the court with jurisdiction.

9. Conclusion

This brief study of the present legal situation, regarding a number of copyright issues that raise problems in the field of education, is not complete because it does not provide satisfactory answers to the concerns of this user category, which must necessarily be given privileges. Despite the rigor with which legislative texts are often drafted, it is not unthinkable for a court, in the face of possible disadvantages resulting from the application of a legal text, to apply the discretion often available to it to render a decision based more on expediency than on strict application of legal directives. Neither is it rare to discover that some legal provisions in fact give the courts quite a bit of latitude. Given the uncertainties currently prevailing in the area of protection of works produced for school and university use, it may be desirable for the world of education to take the initiative, at the national, regional or international level, of making public its concerns about a certain number of litigious points. The validity of this attitude could subsequently be confirmed or denied at the national level by courts or by jurisprudence, and at the regional and international levels by jurisprudence, and perhaps even by studies that could be undertaken in this respect by international organizations such as UNESCO, which, through its Constitution, is mandated to ensure an appropriate balance between the interests of creators and those of users of works of the mind.

Article 27 of the Universal Declaration of Human Rights states the issue very clearly in stipulating that:

> "(1) Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits.
>
> (2) Everyone has the right to the protection of the moral and material interests resulting from any scientific, literary or artistic production of which he is the author."

All this work will take time to accomplish, and in the meantime one should not lose sight of the search for immediate solutions to existing problems. This raises the question of the advisability of contacts that the world of education (ministries, institutions, specialized publishers, etc.) should enter into with the copyright management organizations that are responsible for supervising, in the name of copyright owners, the utilization of teaching materials.

It seems to us that negotiations among the parties involved are the most appropriate means of resolving the overall problem of copyright in the world of education, and of managing to define, by consensus: (i) the acts and objects of reproduction requiring the granting of a prior authorization and the payment of a royalty (either for each reproduction, or, as is more commonly accepted, for the utilization of the entire inventory held by the copyright management organization); (ii) the acts to be classified as fair dealing or fair use; (iii) the acts that do not harm the economic interests of copyright holders, and for which no authorization is necessary, provided the author's moral rights are respected.

What is an appropriate school textbook policy in developing countries? Some economic and at times impertinent thoughts

by François Orivel

1. On the usefulness of school textbooks

It may seem trivial to recall that school textbooks are useful, as this is an universally accepted view. And yet, a growing number of schools in the world function with few or no textbooks and continue to be considered schools. This would probably not apply in the case of schools without teachers. Most of those who think that books are useful are not prepared to admit that a school without a teacher continues to be a school. Putting it another way, textbooks are perceived as less important, in the order of priorities, than teachers.

This is a point of view, but it is not the only possible one. Children can learn to read with textbooks and parental assistance, or from peers who know how to read, or from television (consider the 'Sesame Street' programme), but without a teacher. Once they know how to read, they can continue to learn from other books, and still without a teacher. Consequently, it is extremely difficult to become competent in reading, which is, next to writing and arithmetic, one of the three fundamental objectives of school, if one never has access to books. It is the author's opinion that, generally speaking, the relative importance ascribed to different educational inputs puts too much stress on teachers, and neglects far too much the value of recourse to an input with an excellent cost-efficiency ratio -- the textbook.

2. The role of the textbook in pupil performance at school

The question of the cost-efficiency ratio of textbooks has not yet been studied very much, perhaps because the presence of books was considered to be self-evident, and because their proportion of total educational expenditure was virtually negligible. A school textbook project in the Philippines showed (Orivel 1978) that providing textbooks to schools that did not have them resulted in a per pupil cost increase in the order of 1 per cent. On the other hand, the pupil performance improvement in the schools encompassed by the project was considerably greater -- on the order of 15 per cent.

Another study in the Congo (Orivel; Perrot 1989), on the measurement of mathematical skills and the determining factors of these skills among a representative sample of pupils in the final year of primary, revealed that their level was extremely low (the average mark was below what would have resulted from random answers), that possessing a mathematics textbook was associated with only a very slight advantage for the owner, but that, on the other hand, possessing a reader produced an advantage two times greater (in mathematics). The conclusions of this study deserve careful consideration: in the first place,

the weakness of mathematics results is explained more by the inability of pupils to read and understand the questions, than by an intrinsic lack of mathematical skills. Questions with no text, in which it was simply a matter of carrying out an arithmetical operation, yielded better results. On the other hand, when confronted with a somewhat lengthy statement of the problem, pupils scored the lowest results. This explains why pupils who owned a reader had better results in mathematics.

In the second place, the weak impact of textbooks in this specific case is due to the fact that pupils owning a book constitute a minority, and therefore teachers adapt their pedagogy to the fact that the majority of pupils do not have any books. They are forced to proceed as if nobody in the class has a book. The resulting pedagogical approach is based largely on repetition and on learning by rote, and it concentrates on the key points of the curriculum. The above mentioned study (Orivel; Perrot 1989) clearly demonstrates this phenomenon in the Central African Republic, where pupils obtained marks close to those of their French counterparts on questions about the main core of the programme, but completely failed to answer questions about more secondary or peripheral areas, or questions calling more for reflection than rote or automatic learning.

Consequently, in order to be effective, a textbook policy must ensure that all pupils have access to a book, which does not necessarily mean that there have to be as many books as pupils. In the Philippines project, considered in the specialized literature to be a success, one book was distributed to every two pupils, and they were obligated to share it. The results of these pupils were then compared with those of a control group, in which every pupil received a book, and the differences between the two groups were not significant.

3. Availability of textbooks in schools

There is no procedure for systematic collection of data on the availability of school textbooks. Nevertheless, numerous sectoral studies carried out during the eighties highlighted the problem of scarcity of school textbooks in a number of countries, especially poor countries of small size, many of them located in sub-Saharan Africa. Most of these countries became independent in the sixties and had not experienced a shortage of textbooks under the colonial regime. The books were supplied by the colonial power and were required only in limited quantities, given the low school attendance rates at the time. The break in the colonial connection had two consequences: a rapid improvement in school attendance rates, and a deterioration in the textbook supply problem, which has continued to become more acute. During the first years of independence, donations from the colonizing country, or acquisitions from their publishers, provided adequate supplies during the transition. The situation gradually became worse under the combined effect of several factors:

- The volume of donations did not keep up with enrolment growth. In the best of circumstances, it remained constant, becoming just enough to equip a growing number of teachers.

- At the end of the seventies, acquisitions by ministries of education were hampered by the problem of excessive budgetary cost, and many countries had to abandon their policy of entirely free textbooks.

- Acquisitions by pupils' families were not sufficient to compensate for the above mechanisms. In many countries, family income grew at a slower pace than the price of imported books, and their purchase became an excessive burden for more and more families.
- Curriculum reform in many countries, with the adjustment of programme content to local realities, and recourse to national languages as the languages of instruction, made imported textbooks unusable.
- The creation of national textbook production entities did not fulfill the hopes placed in this effort, because of the difficulties involved in mastering a complex industry when there is no national tradition or experience in this respect.

4. Textbook selling prices and family income

When a textbook is imported, its selling price tends to be higher in the importing country than for consumers of the exporting country (if only because of the additional transport cost). Now it often happens that the average purchasing power of families in the importing country is very much below that found in exporting countries; taking the example of Francophone Africa, it is not unusual to observe a fifty-fold difference between France, which exports its books, and the importing country. Taking into account the fact that the average French family displays no enthusiasm for the purchase of school textbooks, and that the French Ministry of National Education has had to provide them free of charge at the level of compulsory schooling, it can come as no surprise that families with fifty times less income are forced to give up on school books. One cannot help but draw the obvious conclusion: there will be no school books in poor small countries as long as it is necessary to import them from rich countries at the price at which they are sold in those countries.

It is possible, of course, to organize one-shot supply campaigns based on massive foreign donations, such as that of the French Co-operation Ministry in Guinea in 1984, or in connection with certain loans from the World Bank or other development institutions, but these are just palliatives, without the stability that is necessary for the smooth operation of any educational system.

5. Cost structure and selling price

In developed countries, the selling price of textbooks generally falls into the $10 -$20 range. To have any chance of convincing a majority of families in poor countries to buy textbooks, the price must not exceed a range of $1 - $2, that is, ten times less. This is what one finds in China, in India, and even in certain countries with a medium income level, such as Tunisia or Morocco. This is also the cost price noted in some countries that pay for textbooks from public funds, such as Mexico and the Philippines.

In the cost structure of a school textbook, there are items for which international variability is low, and others for which it is much greater. The component with the lowest variability is without doubt the physical production of the book by the printer. It is now possible to manufacture school books of acceptable quality at a cost of half a dollar to a dollar. In order to achieve a selling price of $1 - $2, it is necessary that the sum of all the

other costs (copyright, inventory, advertising, distribution, transport, interest charges, profit margins) be itself within the $1 - $2 range. There is no doubt that this is not easy, especially for publishers in northern hemisphere countries, but we insist that it is possible. In Mexico, for example, the sum of all these costs is less than half a dollar. This obviously results in certain disadvantages, such as small variety of titles, delivery delays, lack of competition, etc., but these disadvantages have to be assessed by comparison with those resulting from their elimination: a large number of pupils with no books at all, and even lower average school performances.

In economic terms, it is a question of promoting a 'second best' approach, that is, rejecting the ideal solution that one cannot afford, and looking for the best possible compromise: which 'quality' aspects is one prepared to give up on, in order to ensure availability of textbooks.

One of the fundamental laws of the book printing industry is the existence of significant economies of scale. In other words, production costs tend to decline as the number of copies of the same work increases. It is all the more difficult to take advantage of this law when the country is small (low enrolment at a given level), when the language of instruction is used by a limited number of pupils (a problem when mother tongues are introduced), and when the curriculum changes frequently (watch out for 'reformitis', that well known illness of ministries of education).

Moreover, the impact of this law is different for different cost components. It has no impact at all for copyright fees if they are paid on a per-copy basis, but its impact is very effective if these fees are paid on a lump-sum basis and hence completely independent of the print run, or if they are waived, when, for example, the manuscript is written by salaried Civil Servants with the National Institute of Pedagogy, or when, much less frequently, the text is already in the public domain, such as the famous 'Mamadou' and 'Bineta'. Clearly the way authors are remunerated is an important factor in textbook costs.

This law also pertains to the physical production of books, at least up to a certain stage. In the study of the Philippines project, the manufacturing cost was seen to decline up to a print run of 50,000 copies, but to remain roughly constant after that. It is true that modern printing technologies have reduced the effect of economies of scale, and that it can be more economical to print fewer copies, if the economy of scale does not compensate for the additional storage cost of a longer print run.

Finally, this law applies to advertising costs and more generally to the cost of providing information, by mailing catalogues or various circular letters, in which respect large publishers usually have an advantage over small ones.

As far as the other cost components are concerned, their profile is not very dependent on the number of copies printed, since they amount to distribution margins, which are heavily dependent on the extent of competition among publishers. Now the rules of a competitive market have very little impact on textbooks, because most items are put out by a single publisher, except for the very rare cases of texts that are in the public domain. It is virtually a monopoly market, allowing publishers at least partly to avoid the laws of

competition, and thus to enjoy higher distribution margins than those that would apply in a competitive environment.

To be sure, there is competition in the sense that several titles are available for a given subject at a given level, and teachers do have a choice among several different textbooks. However, this freedom of choice is quite illusory in a small importing country that purchases school textbooks through an international call for tenders. In point of fact, the specifications in the call for tenders almost always indicate, for practical reasons, a given textbook that is, by definition, the monopoly of a particular publisher.

Part III

Recommendations adopted by the International Conference on public education concerning the drafting, utilization and choice of school textbooks 1938 to 1959

Recommendation No. 15
(1938)

The drafting, utilisation and choice of school textbooks

The International Conference on Public Education,

Convened at Geneva by the International Bureau of Education and being assembled on the 18th of July for its seventh session, adopts on the twenty-second of July, nineteen hundred and thirty-eight, the following recommendation:

The Conference,

Considering that the spoken word of the teacher ought to remain the essential and living element of the lesson;

That the activity methods distinguishing modern teaching appeal above all to the spontaneity of the child, to the development of his faculties of observation and reasoning, and demand direct contact as often as possible with actual objects tending thus to lessen the relative importance of the textbook;

That nevertheless the textbook remains for all subjects, not only a valuable guide and an occasional aid, or a means of verification and revision, but also an indispensable auxiliary;

That the educational authorities should ensure that it serves its purpose in the best possible manner;

Submits to the Ministries of Public Instruction of the various countries the following recommendation:

(1) School textbooks should fulfil definite requisites in three fields: pedagogical (scientific bases and methods); technical (appearance and make-up); and economic (purchase price);

(2) In countries where education is directed or controlled by the State, it is for the State to take proper measures to ensure the improvement of textbooks and to supervise their application. This duty will fall, in other countries, on the authorities responsible for the schools;

(3) Commercial competition between authors and publishers being liable to result in lowering the quality of the books, it may be in the general interest that the official authorities should take all useful measures to ensure the publication of textbooks for

the elementary classes, prepared on sound pedagogical lines, well-printed and inexpensive. These considerations have particular weight in relation to textbooks prepared for very young children and to reading books;

(4) In those countries where there is control by the authorities, it is preferable that this control should be exercised before the printing of the textbooks and that the selection committees should comprise not only inspectors and officials of the Ministries, but also school teachers, chosen from amongst those most competent;

(5) It is desirable that the conditions governing the approval of textbooks should be specified by official regulations, and that attention should be directed above all to scientific background and teaching methods. It is understood, of course, that the textbooks should conform to the official programmes, where such exist, that they should not endeavour to harmonise the principles on which the national life is based with those of humanity;

(6) To prevent the drawbacks of too frequent changes of textbooks and the harmful consequences for the pupils which would result, it is desirable:

(a) that the number of textbooks approved by the official authority should be limited in each branch and class;

(b) that the approval given should hold good for a sufficiently long period;

(c) that the number of textbooks used in any one class should not be too great, especially in primary schools;

(d) that there should not be too many changes of text from one edition to another of a particular textbook, at least unless they are justified by sufficient reasons;

(e) that endeavour be made, as far as possible, to assure collaboration between the local education authorities, in order that pupils changing their schools should not be obliged to provide themselves each time with new textbooks;

(f) that the right of the teacher to choose the textbook to be used according to his conceptions or his pedagogical preferences, should be restricted by the approval or the ratification of the competent committee;

(7) It is desirable that school textbooks should be relieved of charges or taxes that would result in an increase in price, and that they should be accorded beneficial treatment as regards the conditions of circulation: carriage, postage rates, etc.;

(8) Where the State itself undertakes the publication and distribution of the books, it is desirable to secure as far as possible their free distribution, particularly to necessitous children;

(9) The purpose of the textbook being simply that of a guide and of an auxiliary, it is desirable to leave to the teacher a certain liberty in its use within the limits of the curriculum;

(10) To facilitate the methodical employment of the textbook by teachers, one might usefully publish for their use special books of reference, or of teaching matter, or again interpolate in the text of schoolbooks a certain number of explanations and annotations;

(11) It is desirable that each school establishment or, at least, the school centre of each locality, should possess for the use of the teachers a library containing the different school textbooks in each branch and in each grade (standard), in order to afford a good choice of books and useful experimentation of various methods.

Recommendation No. 48
(1959)

Preparation, selection and use of primary school textbooks

The International Conference on Public Education,

Convened in Geneva by the United Nations Educational, Scientific and Cultural Organisation and the International Bureau of education, having assembled on the sixth of July, nineteen hundred and fifty-nine for its twenty-second session, adopts on the thirteenth of July, nineteen hundred and fifty-nine the following Recommendation:

The Conference,

Considering Recommendation No. 15 to the Ministries of Education concerning the drafting, utilisation and choice of school textbooks, adopted on the twenty-second of July, nineteen hundred and thirty-eight by the International Conference on Public Education at its seventh session,

Considering that, whatever, methods is used for the publication of school textbooks (State monopoly; completely unrestricted private initiative; a combination allowing either State control or free production; publication by private industry with the possible provision of subsidies or other facilities by public authorities), nothing should be neglected in the effort to ensure that textbooks used in primary schools correspond, in content and appearance, to the requirements of modern educational science,

Considering that, in order to meet present-day needs, close collaboration between authors, publishers and teachers is increasingly necessary,

Considering that, according to reliable estimates, the publication of school books represents half of the world book production and that textbooks are published in larger editions than any other types of work,

Considering that the procedure governing the selection of textbooks from among those published can have a direct influence on the part this teaching aid has to play in educational activity,

Considering that, from both the social and educational points of view, it is of vital importance that no pupil should be denied the opportunity of obtaining the textbooks used in each primary class,

Considering that although the most important role in class work is undoubtedly played by the teacher, the school textbook is nevertheless a valuable aid which can help him bring life to his teaching,

Considering that, generally speaking and especially in schools where the teacher is obliged to work under difficult conditions (overlarge classes, one-teacher schools, etc.), the textbook is an indispensable instrument for the educator,

Considering that in some cases, the school textbook is the first book to come into the home and should therefore form as it were the core of a small family library,

Considering that the school textbook is not only a teaching aid but also an important instrument of moral education, developing the pupil's social attitudes, his respect for work and a sense of brotherhood between nations,

Considering that education and culture are the most rapid and easy means of bringing nations closer and helping them to know each other, and that textbooks can contribute in the same way as the teacher's words and general attitude to greatest understanding among peoples,

Considering that international assistance and collaboration can help to improve textbooks as regards their composition, publication and use,

Submits to the Ministries of Education of the different countries the following Recommendation:

Composition

(1) In view of the role of school textbooks in primary education it is important that, whatever the system applied for compiling them, education authorities should pay increasing attention to the quality of these books from all points of view.

(2) Especially in countries where the composition of textbooks is the prerogative of private initiative, it is advisable to ensure that books used in teaching should be of an unquestionably high scientific, educational and aesthetic standard.

(3) In view of requirements both as regards the content of school textbooks and their values as aids to teaching, it is increasingly desirable that there should be collaboration during the drafting between specialists in educational research, specialists in the subjects treated and the staff who will teach them.

(4) Competitions between authors or group of authors may help to improve the quality of school textbooks.

(5) Especially in countries where the publishing of textbooks is the direct responsibility of a public authority, it seems desirable to appoint drafting commissions or committees to work on their composition.

(6) When the composition of school textbooks is entrusted to drafting commissions of committees, these bodies ought to include, among others, primary teachers in charge of classes for the corresponding level drawn from environments as varied as possible.

(7) When circumstances permit, recourse to the experimental method offers definite advantages, the preliminary use of a proposed textbook in a limited number of classes enables the opinion, suggestions and criticisms of educators who have employed it on a trial basis to be collected.

Publication

(8) In countries where private initiative plays a part in the publication of textbooks for primary schools, the education authorities might arrange competitions between publishing houses for the purpose of raising the quality and reducing the cost price of the works published.

(9) Whatever the practice adopted for the publication of school textbooks, it is desirable to sue all possible means to continue the improvement noted during the past few years as regards typography, illustration, binding, etc.

(10) In countries where production is too limited to allow every pupil to have the books required for the whole curriculum for each class, it is important to take emergency measures giving priority to textbook publication over the production of less indispensable types of school equipment.

(11) In agreement with the other authorities concerned (national economy, finance, customs, etc.), the education authorities should study the means of organizing the production and possibly the importation of textbooks as efficiently as possible; this should ead to a reduction in cost and sale prices without, however reducing the quality.

(12) Countries obliged, for lack of sufficient means of production, to import school textbooks from abroad would do well to require that these be adapted as completely as possible to the country's syllabuses and to its national characteristics.

(13) In countries of a centralized type where school textbooks are published for use throughout the whole national territory, it would be advisable, especially in the case of geography and natural science, to provide for adaptations which would take into account local or at least regional differences.

(14) In countries of a decentralized type which have adopted the practice of official publication of textbooks, the education authorities of the different administrative areas should agree to publish textbooks for certain subjects jointly, so that the number of copies printed may be increased and the cost price reduced.

(15) Very careful attention should be given to legibility (choice of type and arrangement) especially for readers intended for the first school years.

(16) Although illustration, particularly in colour, tend to increase the price of textbooks, consideration should be given to the fact that they aid in comprehension and assimilation particularly in subjects of an abstract nature, in which case they are indispensable, and in books for beginners.

(17) Since the artistic presentation of the textbook exerts a direct influence on the pupils' aesthetic education, it is desirable to follow the example of the progress made in the field of books for children's leisure reading, both recreational and instructive.

(18) In view of the constant wear and tear on school textbooks, consideration should be given to the quality of the paper and to the strength of the binding.

Selection

(19) In countries where the publication of textbooks for primary schools is the prerogative of private industry, or is not the exclusive responsibility of the education authorities, one of the best means of ensuring that textbooks used are of good quality is to draw up and keep up to date lists of selected works from which a final choice should be made for each school or group of schools.

(20) Committees appointed to draw up lists of selected textbooks should be completely objective in their choice, taking into account educational and scientific quality, presentation and sale price, as well as possible reactions on the part of parents; such committees should in any case include representatives of the primary teaching staff.

(21) Where the teacher is left free to choose the textbooks he will use, it is desirable, in the interest of the pupils and of the teaching in general, that every means should be employed to ensure the suitability of the teacher's choice and to preserve the normal progression of instruction from one class to the next.

Distribution and purchase

(22) The free distribution of textbooks to all primary school pupils is the logical corollary of the principle of compulsory schooling.

(23) In the countries where, for financial reasons, this principle cannot be fully applied, free textbooks should be supplied as widely as possible for all those categories of children who have difficulty in obtaining them; to this end, the education authorities and the teaching staff, in collaboration with parent's associations and school cooperatives should find means to provide free textbooks for children who are unable to buy them themselves.

(24) It is is desirable that textbooks, particularly those for the last primary school year, should remain the property of the pupil, so that he may build up around them a small personal library, which would help to cultivate in him the taste and respect for books and a love of culture.

(25) When free textbooks are supplied to primary school pupils as a loan, appropriate hygienic measures should be taken before the books are put back into

circulation; the state of each volume should also be verified to make sure that it is fit for re-utilization.

(26) When responsibility for obtaining textbooks lies with the child's parents or guardians, special steps should be introduced, even the regulation of the sale price, to ensure that the purchase of textbooks is not too heavy a burden.

Textbooks and teaching methods

(27) Primary school textbooks should reflect the progress made in educational science, facilitate the application of methods based on child psychology and correspond to the use which teachers and pupils will make of them.

(28) The author of textbooks should aim not only at a logical arrangement of the subject matter but also, and above all, at adapting his material to the interests and mental capacity of the pupil.

(29) The school textbook should offer a body of facts, ideas and suggestions; the material it provides (texts, documents, illustrations, maps, diagrams, questions, etc.) should also make possible or even necessary the use of methods which will encourage an exchange of ideas between the teacher and his pupils.

(30) Everything possible should be done to see that information given in textbooks corresponds to the facts and is kept up to date, particularly as regards statistics and scientific concepts.

(31) School textbooks should not refer to subject matter which is not in the syllabus used for the classes for which they intended.

(32) The school textbook is an aid for both teacher and pupils and should not be considered as an easy way out; the teacher should aim at bringing out and imprating an understanding of the main ideas in the book, which for the pupil will act as a guide and aid to memory.

(33) Where appropriate to the subject or the method of instruction, each lesson or chapter in textbooks might well be followed by a series of questions and a list of activities or practical work designed to check and consolidate what has been learnt and to help train the child's mind and develop develop his abilities.

(34) The textbook should not be used solely for the acquisition of basic ideas and the memorization of essential notions, but whenever appropriate to the subject it should contain a selection of extracts from specialized works in order to encourage the personal acquisition of knowledge and open up the mind to wider horizons.

(35) Particular care should be given to the vocabulary and modes of expression used in textbooks for primary schools, so that difficulties of comprehension are not added to those arising from the knowledge to be assimilated.

(36) New textbooks should be introduced at the same time as new syllabuses when the latter present differences of spirit of appreciable changes as compared with those which were used before.

(37) In addition to the textbooks distributed to pupils individually, it is desirable to place works of reference at their disposal, in order to give them a taste for personal research; the school or class library becomes in this way an indispensable addition to the textbook.

(38) The trend apparent in several countries towards the general use of teaching guides or teacher's handbooks worked out in close relation to the textbooks used in class is to be encouraged.

Textbooks and international co-operation

(39) Primary school textbooks should play a constructive part in the field of international understanding, with a view to fostering universal brotherhood and effective co-operation between nations; it is therefore important for all countries to take direct or indirect steps to see that the various textbooks are free from any element which might prejudice understanding between nations, social groups, races or religions.

(40) It is highly desirable that joint committees of educators should be formed, as has already been done by many countries, with the purpose of eliminating from school textbooks anything which might harm mutual understanding among their respective peoples; regional or international educational organizations are in a particularly good position to encourage the formation of such joint committees.

(41) School textbooks should be imbued with a spirit of sincere respect for other peoples and with the idea of international co-operation and understanding, and should, where appropriate, supply more detailed information about other countries and the role of international organizations.

(42) International collections of school textbooks have rendered, and should do so still more in the future, great service to authors and editors; education authorities, teachers, authors and editors should be aware of the existence of these international collections.

(43) It is obviously an advantage for international collections of school textbooks to be as complete or as representative as possible; methods, not necessarily the same for all countries, of attaining this end and of keeping the collections up to date should be worked out.

(44) National and international centres of educational documentation should keep textbook collections up to date and organize the exchange of textbooks among the various countries concerned.

(45) Temporary exhibitions of school textbooks containing specimens of textbooks in use abroad as well as those employed in the country are one of the most effective means of helping the improvement of textbooks from every aspect.

(46) When undertaking the revision of school textbooks those responsible for the new editions would do well either to send specialists to consult existing international collections of textbooks or to borrow specimen copies of textbooks in use in other countries.

(47) International organizations and inter-governmental bodies should arrange, as part of their technical assistance programmes, to send experts in primary textbook composition and publication to countries requesting it.

Appendices

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IIEP/S110/Orientation note	Orientation note (available in English and French).	IIEP
IIEP/S110/1	Planification au niveau macro des manuels scolaires et des matériels didactiques (available in English and French)	Mr. A. Damiba
IIEP/S110/2 (REV.1)	Key issues in the management of textbook development (available in English and French).	Mr. A. Read
IIEP/S110/3	Training in textbook development and production (available only in English).	Mr. C. Nair
IIEP/S110/4	Academic books in Zimbabwe (available only in English).	Mr. B. Brine
IIEP/S110/5	L'édition du manuel scolaire au Bénin (available only in French).	Mr. M. Gomez
IIEP/S110/6	Training in textbook writing and development of learning materials in the University of the Philippines (available only in English).	Mrs. G. Encanto
IIEP/S110/7	Curricula and school textbooks : toward indispensable synergy (available in English and French).	Mr. C. Depover
IIEP/S110/8	Copyright and the national production of educational materials (available in English and French).	Mr. A. Amri
IIEP/S110/9	Development of school textbooks and other learning materials in Kenya (available only in English).	Mrs. L. Kipkorir
IIEP/S110/10	Report from a SIDA Seminar on textbook production and its distribution (available only in English).	SIDA
IIEP/S110/11	What is an appropriate school textbook policy in developing countries? Some economic and at times impertinent thoughts (available in English and French)	Mr. F. Orivel
IIEP/S110/12	The textbook : its adaptation to various national contexts (available only in English).	Mr. J. Munoz Juan

IIEP/S110/13	Développement du manuel scolaire et des matériels didactiques : le cas du Maroc (available only in French).	Mr. M. Radi
IIEP/S110/14	Textbook publishing, distribution and financing in Mozambique (available only in English).	SIDA
IIEP/S110/15	Books for technical education and vocational training in foreign countries (available only in English).	Mr. J. Lange
IIEP/S110/16	Atelier Braunschweig du Conseil de l'Europe L'histoire et les sciences sociales Méthodologie d'analyse des manuels scolaires (available only in French).	Mr. J.B. Gicquel
IIEP/S110/17	Développement des manuels scolaires au Burundi (available only in French).	Mr. K. Deogratias
IIEP/S110/18	Textbook Development in Indonesia : country paper (available only in English).	Center for Book Development
IIEP/S110/19	Textbook publishing in Indonesia (available only in English).	Center for Book Development

Programme

Tuesday 27 November 1990:

9:30	Welcome address.	Mr. J. Hallak Director, IIEP
10:00	IIEP expectations and concerns with regard to textbooks and instructional materials.	Mr. J. Hallak Mr. H. Hajjar
10:30	Presentation of the guidance note and overall issues.	Mr. H. Hajjar Mr. E. Brunswic Mr. J. Valérien
12:30	Lunch	
14:00	Presentation of case studies: Burundi Indonesia Kenya Morocco Main conclusions.	Animators: Mr. Brunswic Mr. Valérien
17:00	***Forum n° 1*** Textbooks market for technical education and vocational training. Limits of transferability from the industrialised world to developing countries. Role of multinational firms.	Mr. J. Lange

Wednesday 28 November 1990:

9:30 - 12:30	Workshop on : Planning and managing school textbooks and instructional materials programmes.	
	Group A: (English speaking)	Mr. A. Read
	Group B: (French speaking)	A. Damiba
14:00 - 18:00	Workshop (contd.)	
18:15	Cocktail	

Thursday 29 November 1990:

9:30 - 12:30	Workshop (contd.)	
12:30	Lunch	
14:00	Common findings and conclusions.	
17:00	***Forum n° 2*** Presentation of experiences undertaken in the field of Desk Top Publishing textbooks. Possibilities and limits. Mid-term development perspectives.	Mr. D. Walker

Friday 30 November 1990:

9:30 - 11:30	Synthesis and priorities in terms of research and timing.	
11:30	Closing ceremony.	

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